

Calendar Year 2009 Louisiana TravelsAmerica Visitor Profile Report

June 2010

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Introduction and Purposes of the Research

TNS is pleased to present this TravelsAmerica report for the Louisiana Office of Tourism. TNS conducts this online (data collection) project continuously throughout the year as a nationwide syndication. The results enable the assessment of visitor volumes and development of profiles of leisure visitors to the state.

As a tracking study, TNS and the Louisiana Office of Tourism constantly strive to improve the research. This report assesses the total volume of visitors to Louisiana plus those arriving from three key areas. The profile of Louisiana's visitors encompasses:

- Volume and source of visitors
- Basic demographics such as age, number of children in household, household income
- Trip characteristics such as day vs. overnight, business travel, travel expenditures, length of stay, activities selected, travel timing (quarter), mode of transportation
- Visitor residence by state and DMA
- Satisfaction with Louisiana as a destination
- An Export/Import assessment of spending by Louisiana residents traveling elsewhere vs. non-Louisiana residents visiting Louisiana
- Competitive destination comparisons to Louisiana



Introduction and Purposes of the Research *continued*

■ Specific segments of visitors:

- In-state residents
- High BDI Marketing Area (Above average number of visitors from DMA; see appendix)
- Residents living elsewhere (neither in-state nor in the High BDI Marketing Area)
- African-Americans
- Hispanics
- Mature visitors (defined as those 55+)

■ Six regional profiles:

- Alexandria
- Baton Rouge
- Lafayette
- Lake Charles
- New Orleans
- Shreveport.

The report continues with the Executive Summary followed by the Results of the Research section, which includes detailed tables and graphics of findings. The appendix contains a description of the Business Development Index by DMA, the research methods, and a glossary of terms.



One page overview

Abstract

Derived from the TNS TravelsAmerica syndication, highlights from this third annual report prepared for Louisiana Office of Tourism for Calendar Year 2009 (January 1 through December 31, 2009) include:

- Louisiana successfully draws tourists from in-state and nearby areas (High BDI Marketing Area) as the proportion of visitors shrinks from the more distant source markets (23% vs. 28% in 2008).
- For information, Louisiana visitors still most heavily rely on past experience, word of mouth (friends/relatives), and various Internet sources. However, their booking behavior shifted in 2009 as they became more likely to book online than offline (the two methods were nearly equal in 2008).
- Because visitors often arrive from in-state or from the High BDI marketing area, most drive (73%). That said, some areas, most notably New Orleans, draw visitors from farther away, who in turn, tend to stay longer and spend more. Those distant visitors are harder to attract, but worth more once they come.
- Special markets (African-Americans, Mature Travelers, Hispanics) each have unique travel patterns, preferences, and desires that Louisiana can fulfill and promote – gaming, nightclubs, fine dining, and shopping are just some of the features where Louisiana fits well with these groups.
- Each destination within Louisiana has attributes that attract visitors – New Orleans perhaps has the greatest variety, but Shreveport and Lake Charles attract gaming tourism, especially among retirees, while Lafayette and Alexandria get credit for good shopping. They each have strengths to lure potential tourists.
- While the tourism export/import “balance of trade” assessment remains very positive, the proportion of travel spending by Louisiana residents elsewhere (imports) is growing and Louisiana may want encourage greater in-state tourism as well as appealing to potential out-of-state visitors.



Executive Summary/Implications

Importance of tourism to Louisiana

Several measures underscore the importance of tourism to Louisiana:

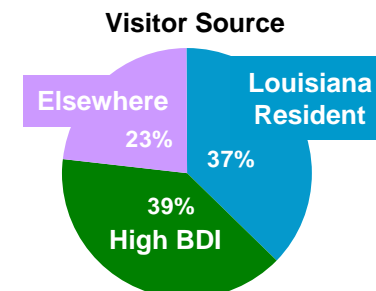
- Louisiana continues to attract more visitors than Arkansas and Mississippi, but trails Alabama and, of course, Texas and Florida.
- **Overnight Volume.** Louisiana visitors usually stay overnight (69%), similar to last year (70%) and total US travelers (71%). The average length of stay hovers near three nights, similar to most other nearby states (but lags Florida's 4.7 nights). Even more positively, those staying in paid accommodations (hotel/motel/B&B) rises to nearly half of all over-nighters (47% from 42% last year), and exceeds all primary competitors (34% to 41%).
- **Travel Spending in Louisiana (excluding transportation).** Despite the growth in paid accommodations, Louisiana visitor spending slips slightly, but remains above two years ago (\$427 from \$465 in CY 2008 and \$412 in CY 2007). Further, it surpasses all competitive states with the exception of Florida (\$757) and Tennessee (\$467).
- **Balance of Trade.** The volume and spending level for Louisiana enables it to maintain a "surplus." Exports (travel dollars coming into Louisiana from non-residents) soften but continue to substantially exceed imports (Louisiana residents who spend travel dollars outside Louisiana). In addition, many domestic travel dollars remain in the state (Louisiana residents traveling locally). Exports = 48%; Imports = 43%; Domestic = 9%.

Executive Summary/Implications

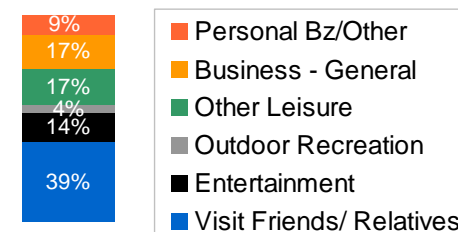
Importance of tourism to Louisiana - *continued*

Several measures underscore the importance of tourism to Louisiana - *continued*:

- **Source of Visitors.** Louisiana builds strong tourism with nearly two-thirds of Louisiana's visitors living outside the state (39% from the 29 High BDI Marketing Area states and 23% from elsewhere).
- **Trip Purpose.** Leisure travel (74%) continues to be the greatest source of visitation compared to business (17%) or other travel reasons (9%). Visiting friends/relatives (39%) dominates leisure travel, followed by entertainment (14%).
- **Timing.** While national travel peaks in summer, Louisiana's greatest visitation occurs in the spring months, proving its ability to promote the shoulder season to potential visitors. In addition, a higher proportion of visitors came in the Fall of 2009 than in Fall of 2008, suggesting some recovery from the financial crisis.
- **Business Travel.** Business travel behaviors/choices differ from leisure travelers. While they represent fewer trips (17% vs. 74% strictly leisure), they more often fly (34% vs. 11%), stay longer (3.8 vs. 2.8 nights), pay (hotel/motel) for lodging (2.8 vs. 1.1 nights), and are more likely to travel alone (66% vs. 21%).



Trip Purpose All LA Visitors CY 2009



Executive Summary/Implications

Profile: Trip and travel characteristics

- **Demographics.** Louisiana visitors generally mirror last year and Total US Travelers, with some variations, most notably ethnicity. Differences also appear by residence with in-state Louisiana visitors often lagging the Total Louisiana visitor.

Characteristics (Louisiana CY2009 Visitor; Louisiana CY2008 Visitor; Total US CY2009):

No/Very Little Difference

Age	(46; 45; 46)
Married	(61%; 58%; 61%)
With Kids	(32%; 36%; 35%)
Future Shaper/Maker	(33%; 32%; 31%)
Retirees	(17%; 17%; 16%)

Minor Differences

Income	(\$65K; \$66K; \$71K)
College Grad	(38%; 40%; 45%)

Larger Variances

African-American	(17%; 16%; 7%)
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Characteristics that vary by residence
(In-State; Total Louisiana Visitor):

Younger	(43; 46)
Less Affluent Income	(\$50K; \$65K)
Fewer Married	(55%; 61%)
More with Children	(35%; 32%)
Fewer College Grads	(34%; 38%)



Executive Summary/Implications

Profile: Trip and travel characteristics - continued

- **Travel Planning Horizons Remain Short, But Vary by Distance.** About half (45%) of Louisiana visitors decide to take the trip relatively spontaneously (within two weeks of departure), but the spontaneity declines with increasing distance (and travel time): in-state (61%), High BDI Marketing Area (45%), elsewhere (26%). Mature visitors (40%) are also somewhat less likely to make a last minute decision.
- **Travelers Primarily Rely on “Experience” for Information.** Similar to other travelers, Louisiana visitors rely most heavily on past experience (27%) and word of mouth (18%) for information to plan a trip. While the Internet is a popular place to gather information (23%), just one traveler in eleven (9%) currently uses destination websites. Printed information (4%) has even less reach and impact.
- **Louisiana Visitors Book “Offline” More Often Than Others.** Louisiana visitors now book online (48% vs. 36% offline) notably more often than offline – marking a shift from last year when online and offline booking methods nearly matched (46% online vs. 44% offline). This suggests that Louisiana visitors may be becoming more Internet reliant.
- **Most Visitors Drive.** Three-quarters of visitors drive to their destinations (73% to Louisiana vs. 73% Total US). The proportion, as expected, declines with distance: residents (91%), High BDI Marketing Area (79%), and elsewhere (33%).
- **Overnighters Spend More.** Not surprisingly, because of the additional time spent on the trip and because they incur lodging expenses (averaging 3.0 nights), Overnight visitors spend three times as much as day trip visitors (\$512 vs. \$171).



Executive Summary/Implications

Diverse characteristics appear in ethnic/age segments

Given differing travel habits and motivations, marketing messages can be tailored to increase relevance for key target groups. Three separate markets covered by this report include (comparisons shown below are the segment vs. all Louisiana visitors):

■ African-American Visitors:

- **Demographics:** This group comprises one sixth (17%) of all Louisiana visitors. In many ways, they trail other visitors – younger (37 vs. 46), less affluent (\$50,700 vs. \$65,200), less often married (37% vs. 61%, which contributes to lower reported incomes), and more often (40% vs. 32%) live with children. However, they lead other segments in full-time employment (68% vs. 63%) – consistent with their youth.
- **Travel Patterns:** Almost half travel to Louisiana to visit friends and relatives (46% vs. 39%), thus representing a less profitable niche. While they stay overnight almost as often (64% vs. 69%) and for just as long (3.0 nights) as other Louisiana visitors, they more often opt to stay with friends or relatives (43% vs. 37%). They spend less (\$371 vs. \$500) than every other segment except in-state visitors (\$209).
- **Activity Choices:** African-Americans choose nightclubs/dancing at twice the rate of Total Louisiana visitors (18% vs. 8%).

Executive Summary/Implications

Diverse characteristics appear in ethnic/age segments - *continued*

■ Hispanic Visitors:

- **Demographics:** The smallest of the key segments (2% of Louisiana visitors) and, consequently (caution to reader), reflect a small sample size (n=17). This group matches the total sample on age (46) with similar incomes (\$63,800 vs. \$65,200). More of them live in larger (3+) households (59% vs. 39%) and with children (41% vs. 32%).
- **Travel Patterns:** Similar to others, they usually travel for pleasure (78% vs. 74%). They represent a potentially profitable niche (*caution; small base size*) as they more likely stay overnight (94% vs. 69%), but don't stay as long (2.4 vs. 3.0 nights). They spend at average levels (\$504 vs. \$500).
- **Activity Choices:** More often choose casinos/gaming (31% vs. 16%), fine dining (24% vs. 15%), and nightclubs/dancing (22% vs. 8%).

■ Mature Visitors:

- **Demographics:** Representing almost a third (31%) of Louisiana visitors, this group, by definition, is older (64 vs. 46). They report slightly above average incomes (\$68,800 vs. \$65,200), and more often claim to be Caucasian (92% vs. 80%). Consistent with their age, they represent more retirees (50% vs. 17%).
- **Travel Patterns:** This group often spends the night (64% vs. 69%) and for an average length of time (3.0 nights), with about half paying for lodging (53% vs. 47%). They spend slightly less overall (\$454 vs. \$500) but more on gaming \$113 vs. \$67).
- **Activity Choices:** More often gamble (23% vs. 16%).



Executive Summary/Implications

Diverse characteristics appear by destination

Destinations may want to tailor their marketing messages to those they attract, as noted for these six Louisiana areas (all ranked):

Age

Lafayette	41
New Orleans	42
Alexandria	43
Baton Rouge	44
Lake Charles	47
Shreveport	50

Income

Alexandria	\$46,700
Lafayette	\$49,800
Shreveport	\$56,000
Baton Rouge	\$59,300
Lake Charles	\$64,100
New Orleans	\$78,300

Employed Full-Time

Shreveport	47%
Lake Charles	58
Alexandria	60
Baton Rouge	64
Lafayette	69
New Orleans	74

Retired

New Orleans	5%
Lafayette	12
Baton Rouge	13
Alexandria	20
Shreveport	31
Lake Charles	31

Married

Lafayette	51%
Alexandria	53
New Orleans	57
Baton Rouge	62
Lake Charles	62
Shreveport	62

% With Children

Lafayette	33%
New Orleans	35
Shreveport	35
Alexandria	41
Baton Rouge	45
Lake Charles	46

% African-American

Lake Charles	12%
Baton Rouge	19
New Orleans	19
Shreveport	20
Alexandria	22
Lafayette	24

% LA Resident

Lake Charles	22%
Lafayette	24
New Orleans	26
Shreveport	34
Baton Rouge	49
Alexandria	58



Executive Summary/Implications

Travel choices also vary by destination

Destinations can align their marketing messages to fit with the travel patterns of their visitors (ranked):

% VFR*

Shreveport	29%
New Orleans	32
Lake Charles	32
Lafayette	42
Alexandria	46
Baton Rouge	50

% O/N** and # Nights

Shreveport	67%	2.6
Lafayette	71	3.8
Baton Rouge	72	3.4
Lake Charles	72	2.7
Alexandria	78	3.4
New Orleans	81	3.6

% Travel in Pairs

Alexandria	21%
Baton Rouge	28
Lafayette	28
New Orleans	37
Lake Charles	39
Shreveport	46

% Drive Own Auto

New Orleans	51%
Baton Rouge	76
Alexandria	79
Lafayette	85
Shreveport	85
Lake Charles	86

Top Two Activities

Baton Rouge	Visit Relatives 28%; Visit Friends 22%
Alexandria	Visit Relatives 38%; Shop 19%
Lafayette	Visit Relatives 22%; Shop 21%
New Orleans	Fine Dining 29%; Urban Sightsee 27%
Shreveport	Gaming 38%; Visit Relatives 19%
Lake Charles	Gaming 51%; Visit Relatives 21%

Spending in LA

Alexandria	\$376
Shreveport	\$410
Lafayette	\$443
Baton Rouge	\$425
Lake Charles	\$503
New Orleans	\$858

Satisfied*** with LA

Lake Charles	76%
Alexandria	77
Baton Rouge	78
Shreveport	78
New Orleans	82
Lafayette	86



Executive Summary/Implications

Competition fiercest in, but not limited to, the South

- **Southerners Stay in the South, but Are Willing to Travel Beyond.** Not surprisingly, particularly in the current market, proximity continues to play a substantial role in destination choices. The top six destinations chosen by Louisiana visitors are all southern states (TX, FL, MS, AL, TN, GA); however, California, Nevada, New York, and Arizona also make the top twelve.
- Top cities (DMAs) visited reflect a very different pattern; New York overtakes New Orleans as the top city visited in the past three years, New Orleans now ranks second, followed by other non-Southern areas: Las Vegas, Chicago, and Dallas.

Louisiana generates high levels of satisfaction

- **Across Geography and Segment, at least 8 in 10 are Satisfied with Louisiana.** Louisiana visitors rate the state highly, with those living in-state (86% extremely/ very satisfied) assigning higher “marks” than High BDI Marketing Area (82%) or other visitors (77%).



Executive Summary/Implications

Assessment

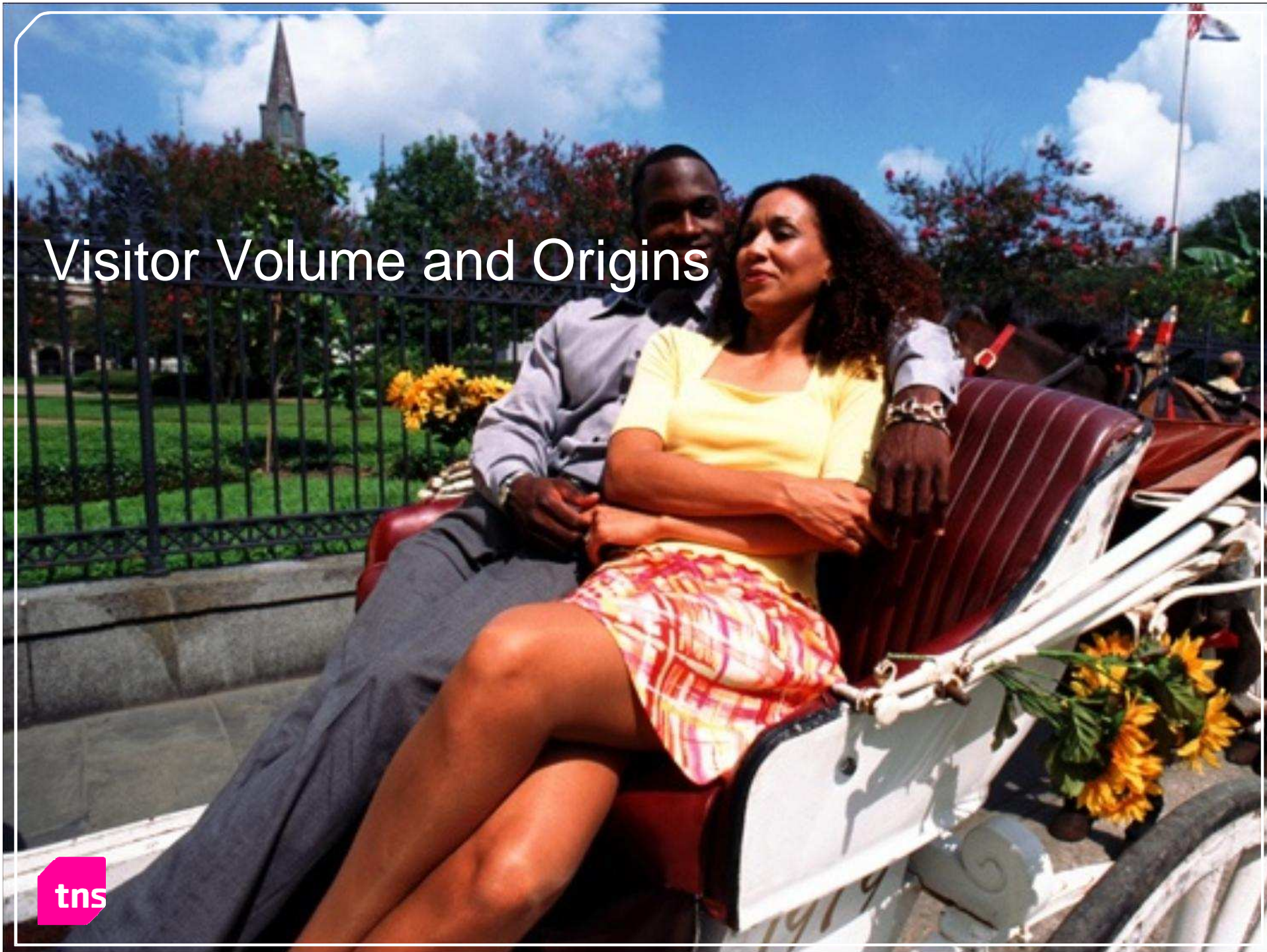
- **The Economy Impacts Travel but Tourism Is Weathering the Storm.** Just like US travel in general, Louisiana visitation continues to decline. However, the state dropped by only half as much as US travel in 2009 (4% vs. 9%) from 2008, indicating greater general health for the area and improved market share. As TNS has seen in other research, travelers are reluctant to cancel their travel plans, preferring to look for less expensive options and stay closer to home. This creates an opportunity to focus on attracting in-state and other nearby tourists – especially those in the High BDI Marketing Area.
- **Word of Mouth and Past Experience are Key to Future Growth.** Recommendations from friends and family, along with past experience are the most important sources of information about destinations, and can be difficult to control. Louisiana already enjoys strong satisfaction among visitors and needs to maintain this. Further, use of social media tools could help Louisiana “spread the word” among family and friends.
- **Local Tourism and Specialty Markets are Important, but Those Traveling Greater Distances Should Not be Ignored.** Almost a quarter of Louisiana visitors (23%) come from outside of the state and the High BDI marketing area. These people stay longer, pay for lodging, take advantage of more “tourist” activities, and as a result spend considerably more (\$872 vs. \$500) than the average visitor. New Orleans is the most successful area in attracting these visitors – perhaps other areas could entice those tourists to stay an extra day or two to explore their unique features as well.



Results of the Research



Visitor Volume and Origins

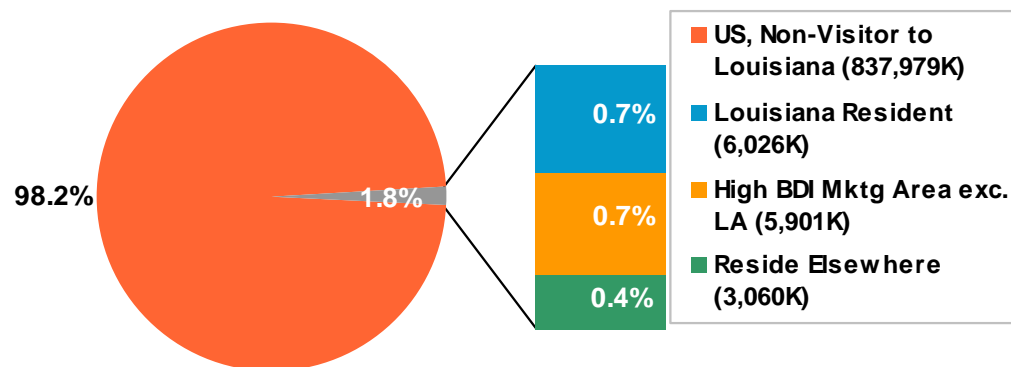


Overall volume of visitors to Louisiana

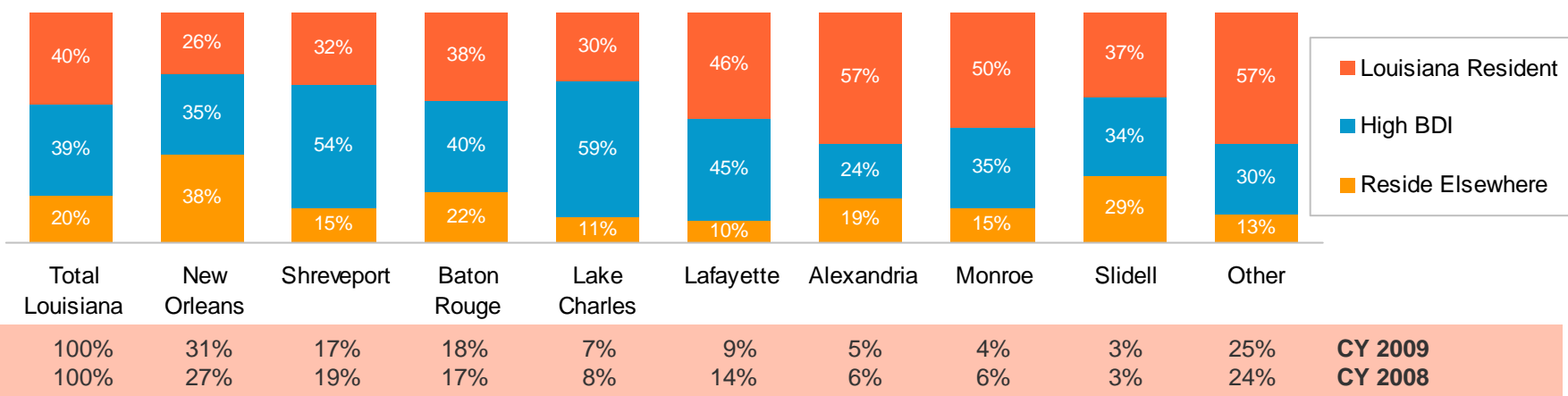
Market overview (person-trips): volume declines slightly in 2009

- CY 2009 person-trips visits to Louisiana (14,988,000) represent a 4 percent drop from CY 2008 (15,600,000), about half the rate of decline of trips for the total US (9%; 852,967,000 from 938,563,000)
- Louisiana continues to draw most visitors from those most familiar with it – in-state residents and the High BDI Marketing Area
- New Orleans remains the most popular city and draws most of its visitors from the rest of the country (38%); further, its proportion of total visitation rises (31% from 27% in 2008).

Projected Visitation – All US Trips (852,967,000)
Projected Visitation – All Louisiana Trips (14,988,000)



Louisiana Cities Visited by Residence
(% of All Louisiana Visitors; Multiple Cities Allowed)



% of Total Louisiana Visitors (Person-Trips) Who Visit Each City



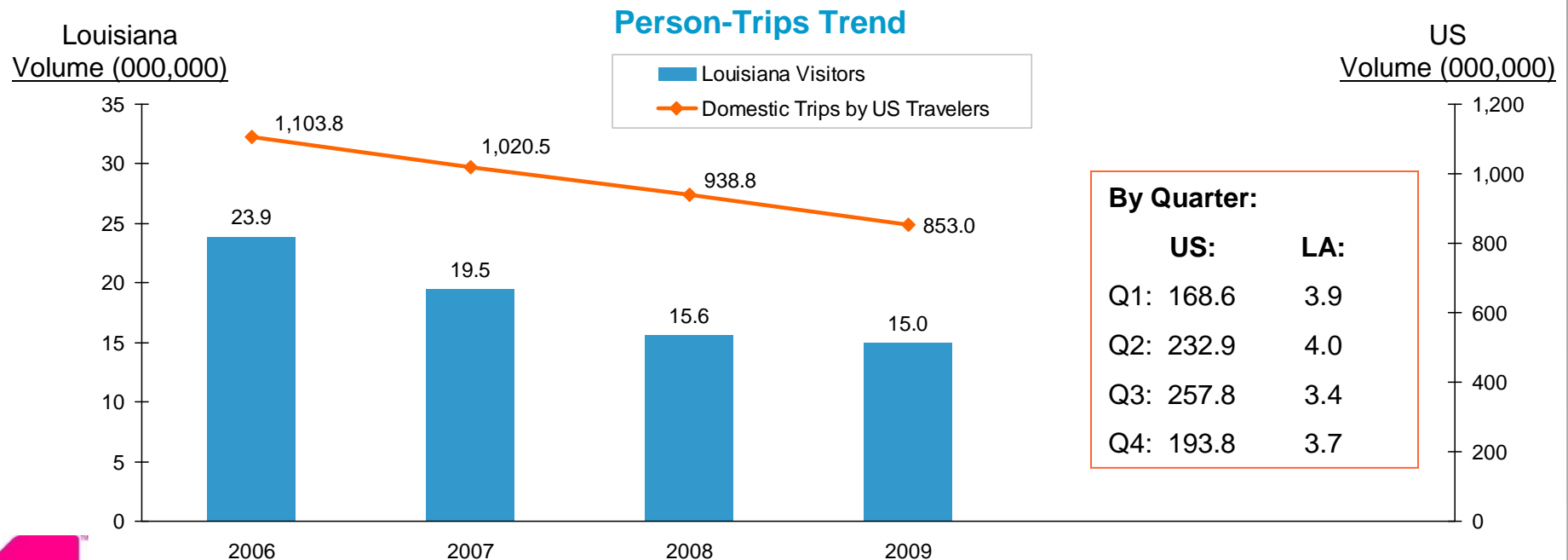
© TNS 2010

Q4a. Please indicate the US state(s) visited (Person Trips) (day or overnight trip)

Recent Louisiana volume compared to US

Louisiana's decline slows compared to prior years

- Domestic trips by US travelers continue a steady decline reflecting the tough economic times during 2008 and 2009 which should reverse as the economy improves
- Louisiana visitation also continues to slide, but at a slower pace in 2009 than in the US overall
- Unlike US travel, with most trips occurring in Q3 (July-September), Louisiana's visitation draws a larger share of visitors in the first part of the year (January – June).



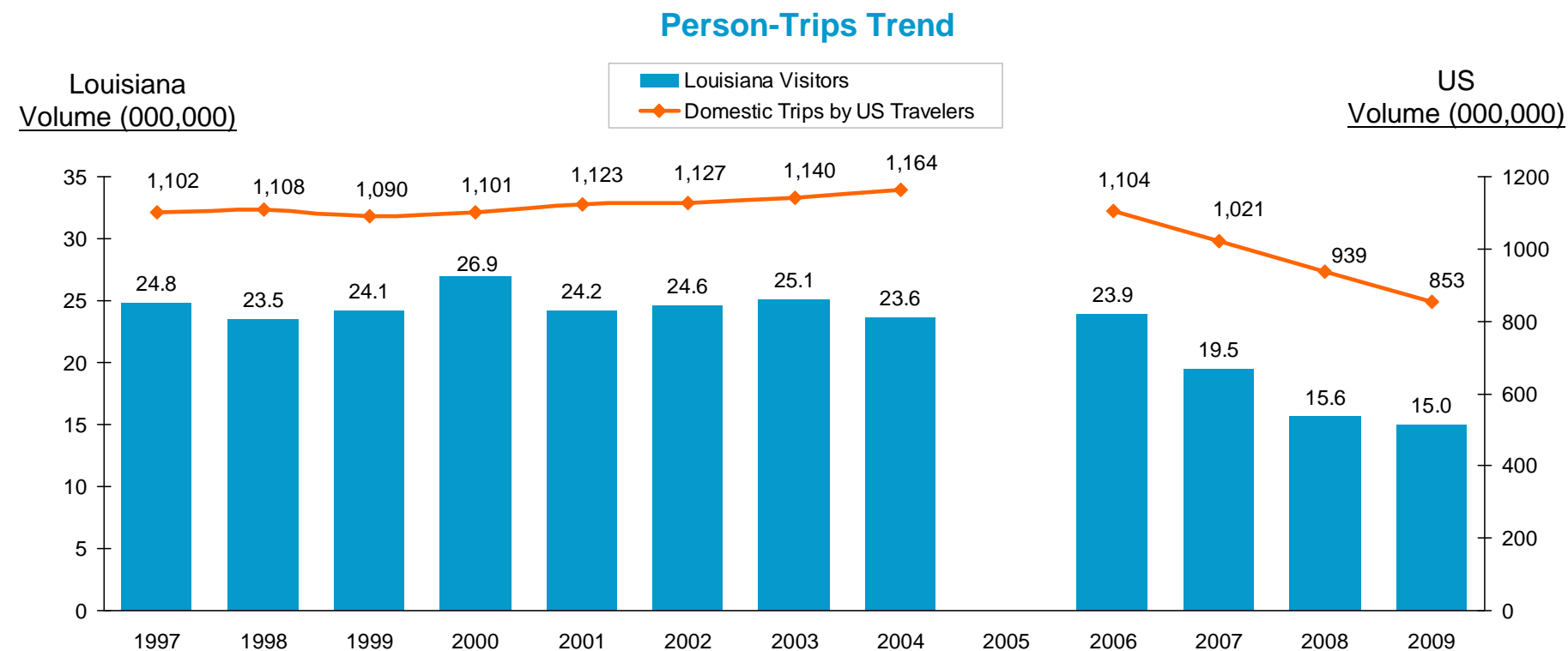
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Q4a. Please indicate the US state(s) visited (Person Trips) (day or overnight trip)

Louisiana's historical visitor volume

Longer trends

- The rapid decline in visitation to Louisiana begins to slow in 2009 – a more positive result than for the US as a whole.



Source: 1998 – 2004 = TIA
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Q4a. Please indicate the US state(s) visited (Person Trips) (day or overnight trip)

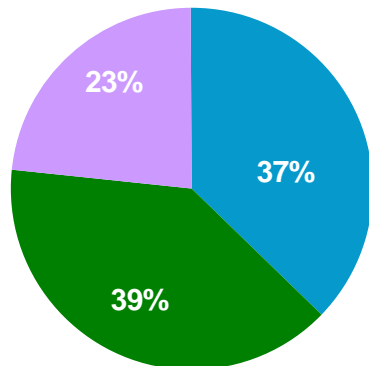
Relative size of key segments

Market relevance

- Out of 210 DMA areas, Louisiana hosts an above average number of visitors from 29 of those outside of Louisiana (Louisiana's High BDI Marketing Area, shown later)
- The greatest proportion of travel parties live in the state (37%) or the High BDI Marketing area (39%). Reflecting the economy, where fewer people travel overall and/or stay closer to home, the proportion of visitors from inside the state grows slightly (37% from 36% in CY 2008 and 32% in CY 2007)
- The bulk of Louisiana visitors (41%) place in the 35-54 age category, with roughly equivalent proportions the younger (29% under 35) and mature (31% aged 55+) groups
- By ethnicity, Louisiana hosts more than double the US average of African-Americans (17% vs. 7%), but the vast majority of visitors are still Caucasian (77%).

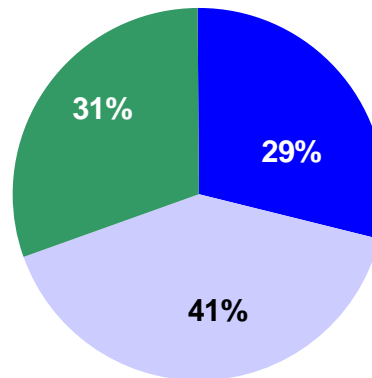
Proportion of Louisiana Visitors by Segment

By Source



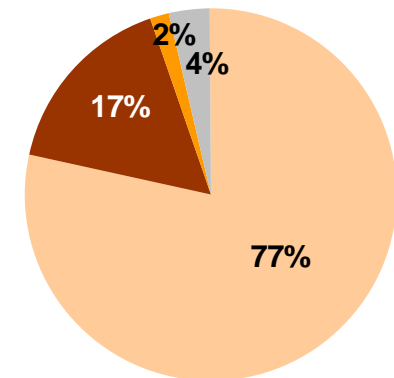
■ Louisiana ■ High BDI ■ Elsewhere

By Age (Mature = 55+)



■ Under 35 ■ 35 - 54 ■ 55+

By Ethnicity



■ White ■ AA* ■ Hispanic ■ Other

* African-American

Caution: Note Very Small Sample (17) for Hispanic yields less reliable comparisons

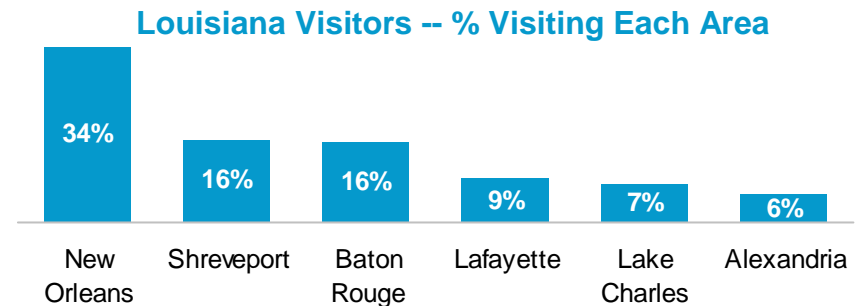


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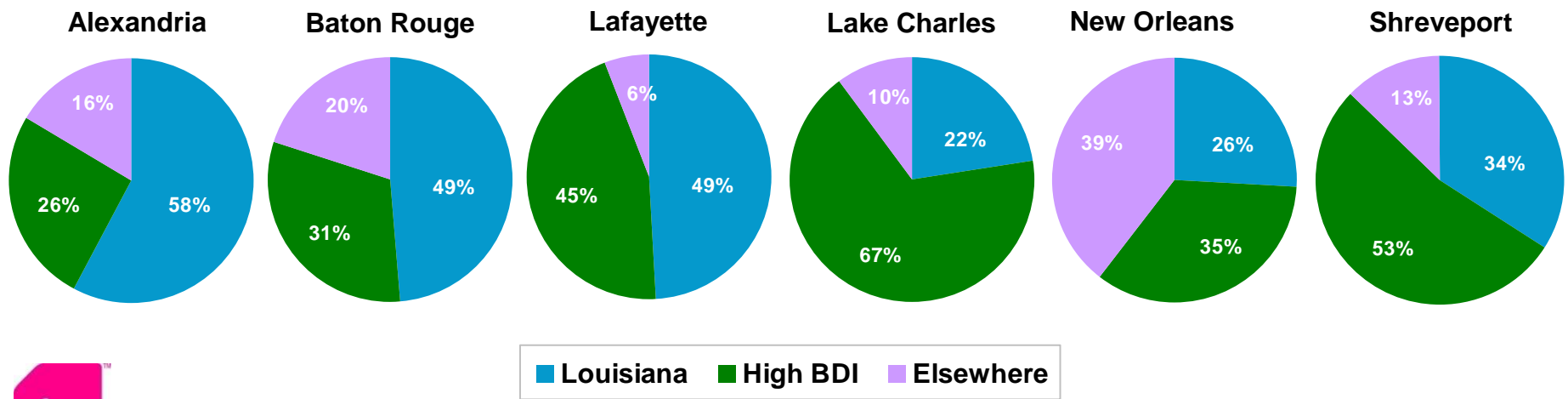
Source of visitors by Louisiana destinations

Market relevance

- A third (34%) of Louisiana visitors stop in New Orleans; Shreveport and Baton Rouge battle for second place
- The source of visitors to each area varies widely:
 - Alexandria, Baton Rouge, and Lafayette depend more heavily on locals (LA residents)
 - Lake Charles and Shreveport attract the largest share of High BDI residents
 - New Orleans draws from everywhere and claims the largest share of more distant ("elsewhere") visitors.



Proportion of Louisiana Visitors to Destination by Source



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Panel: Residence (Household Level-demo wtd)

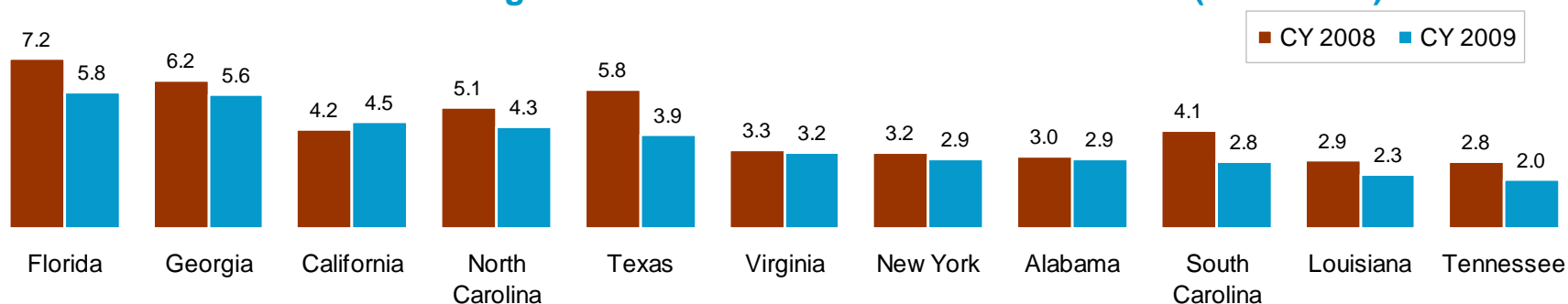
22

African-Americans visitors

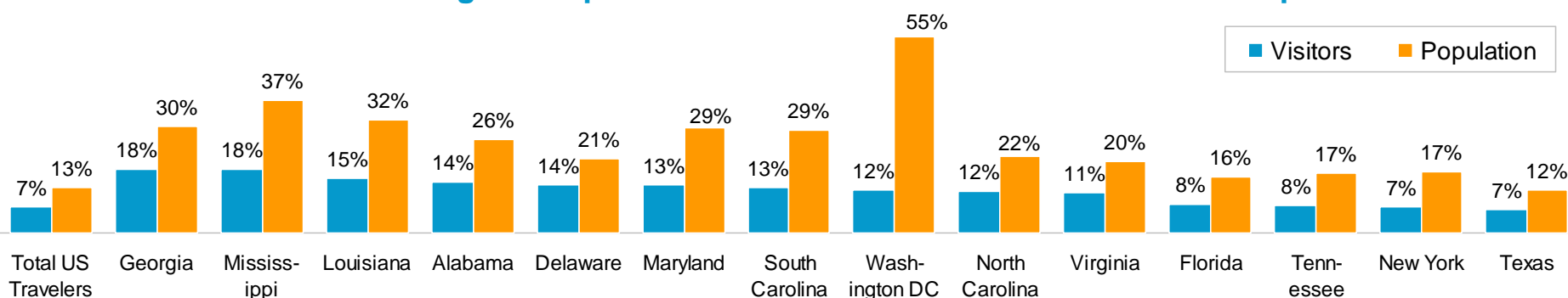
African-Americans travel less to most states

- Florida and Georgia enjoy the greatest number of African-American visitors and California overtakes Texas for third place
- California is the only state to grow the number of African-American visitors in 2009 as travel among this group appears to reflect declining total US trends
- In terms of proportion of visitors, Georgia remains at the top (18% this year and last) while Mississippi (18% from 16%) surpasses Louisiana (15% from 18%) for the second spot.

States With the Largest Number of African-American Visitors (in millions)



States with the Largest Proportion of African-Americans: Visitors and Population



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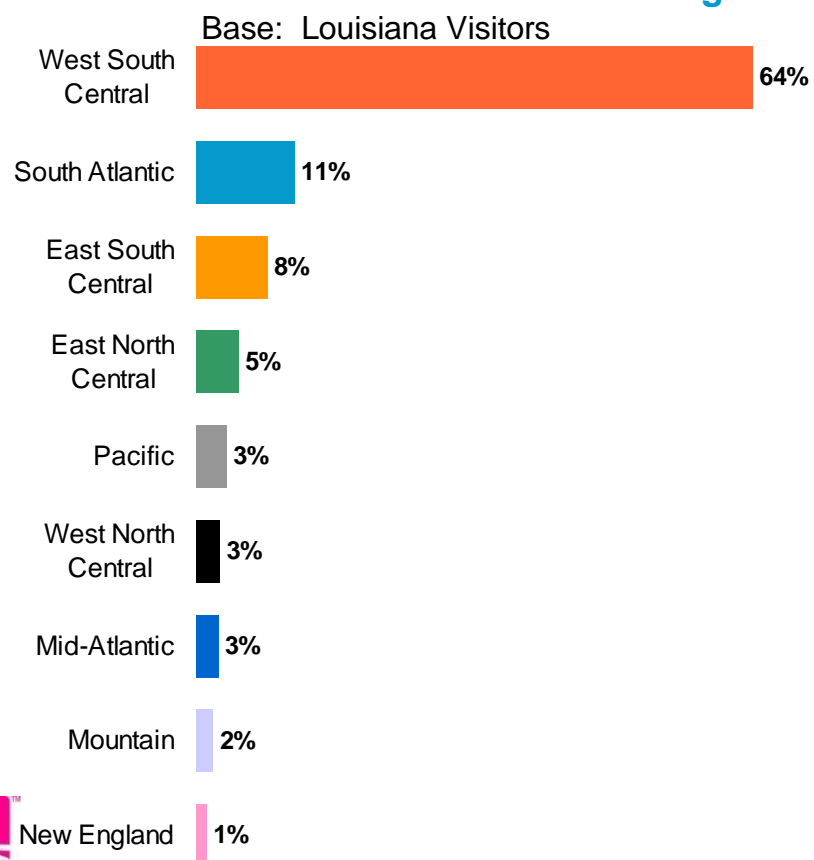
Panel: Residence and ethnicity (Household Level-projected)

Visitors residence

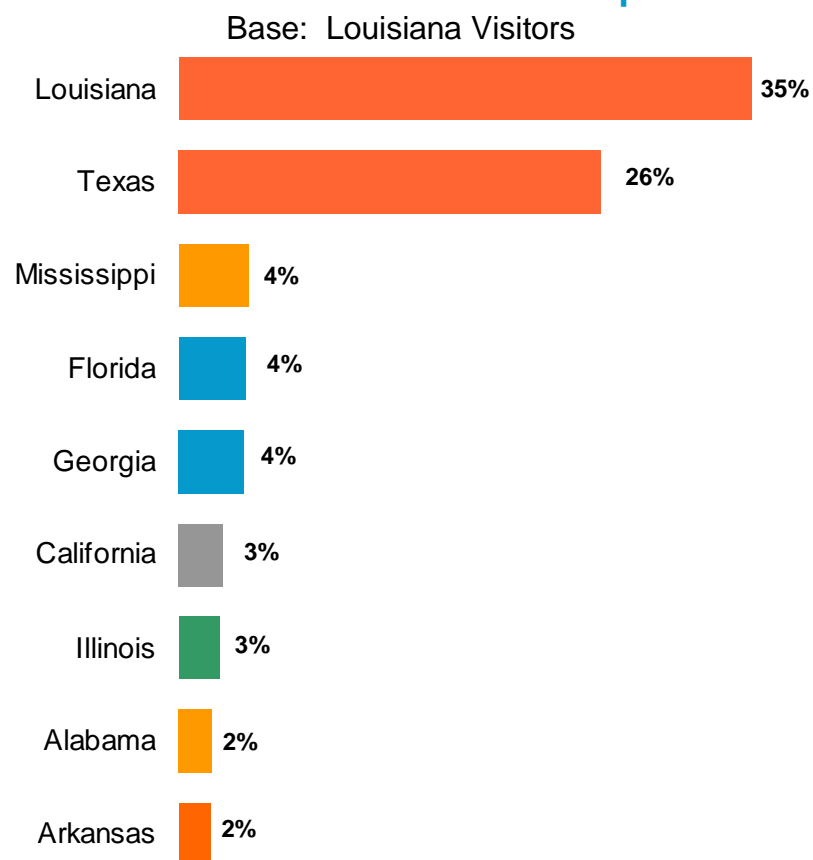
Most visitors live in-state or in nearby states

- Louisiana continues to source two-thirds of its visitors from the West South Central census region, driven primarily by Louisiana (35%) and Texas (26%)
- Mississippi (4%), East South Central; Florida (4%), South Atlantic; and Georgia (4%), South Atlantic tie for third among Louisiana's sources.

Source of Louisiana Visitors: Census Region



Source of Louisiana Visitors: Top States



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Panel: State/Region residence of those who visited Louisiana (Household Level-demo wtd)

Geography (Census Region State Composition)

States within regions shown – this is useful as a reference for the prior slide.

New England	Mid Atlantic	South Atlantic	East South Central	West South Central	East North Central	West North Central	Mountain	Pacific
CT	NJ	DL	AL	AR	IL	IA	AZ	CA
ME	NY	DC	KY	LA	IN	KS	CO	OR
MA	PA	FL	MS	OK	MI	MN	ID	WA
NH		GA	TN	TX	OH	MO	MT	
RI		MD			WI	NE	NV	
VT		NC				ND	NM	
		SC				SD	UT	
		VA					WY	
		WV						

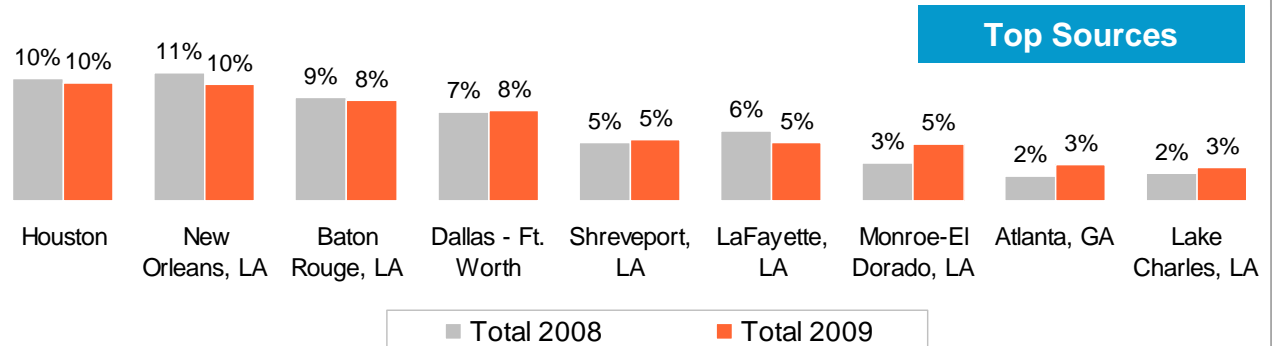
Louisiana visitor residence and trip purpose

Louisiana visitors often live in large, proximal DMAs

- Residents of New Orleans and Houston provide the greatest proportion of visitors to Louisiana
- Houston and Atlanta visitors are more likely to be business travelers than those from any other DMA.

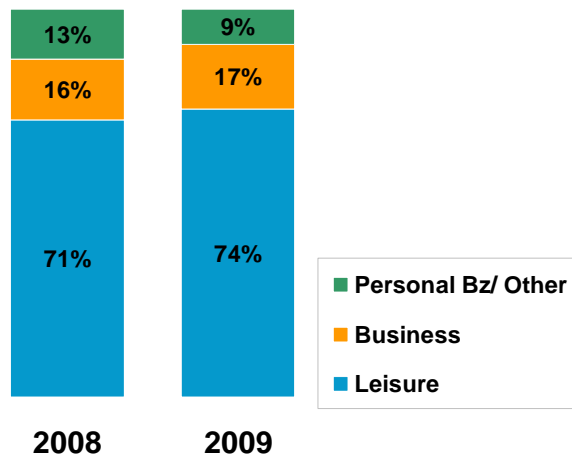
Top Sources of Louisiana Visitors by DMA (3%+)

Base: Louisiana Visitors

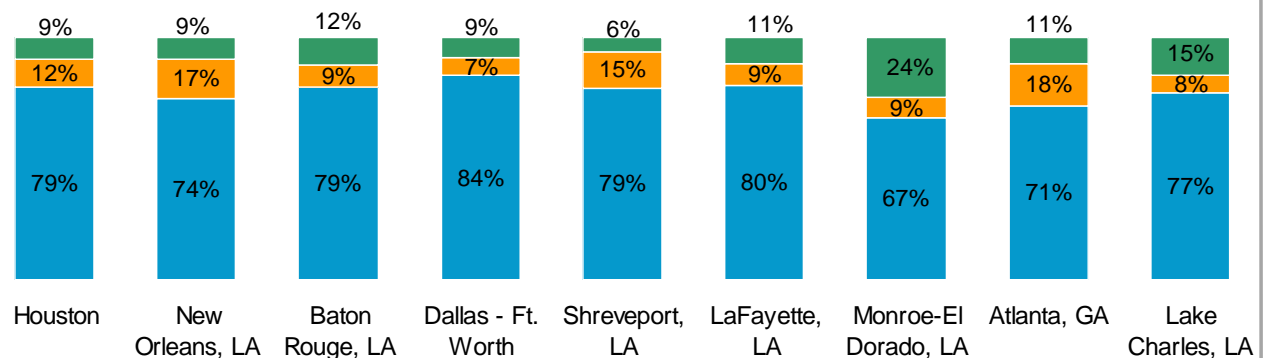


Purpose of Trip

Base: Louisiana Visitors



Source By Purpose



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Q1b: Which of the following was the primary purpose for the trip? Household Level-demo wtd)
Panel: DMA residence of those who visited Louisiana (Household Level-demo wtd)

Louisiana's Business Development Index – Top 15

Louisiana's High BDI Marketing Area

- Louisiana attracts the largest proportion of residents from nearby Mississippi and Texas DMAs
- Overall, 29 DMA areas show above average (index exceeds 100) likelihood to visit Louisiana; the top 15 are shown at right
- The Business Development Index is calculated for each DMA. It measures the propensity of residents to take trips to Louisiana compared to the proportion that DMA constitutes of the total population. For example, Greenwood-Greenville, MS residents represent 0.066% of all US residents, but 0.673% of total Louisiana visitors. Those proportions $0.673/0.066 \times 100$ yield a BDI index value of 1015
- A list of the 50 highest BDI DMAs for Louisiana are listed in the Appendix at the end of the report.

Louisiana High BDI Index

DMA of Origin	High BDI Index
Greenwood-Greenville, MS	1,015
Beaumont-Port Arthur, TX	971
Biloxi-Gulfport, MS	939
Tyler-Longview, TX	873
Jackson, MS	820
Houston, TX	472
Montgomery-Selma, AL	369
Mobile-Pensacola, AL-FL	320
Columbus-Tupelo-West Point, MS	279
Abilene-Sweetwater, TX	279
Dallas-Ft. Worth, TX	255
Corpus Christi, TX	247
Little Rock-Pine Bluff, AR	228
San Antonio, TX	226
Waco-Temple-Bryan, TX	226



Visitor Demographics

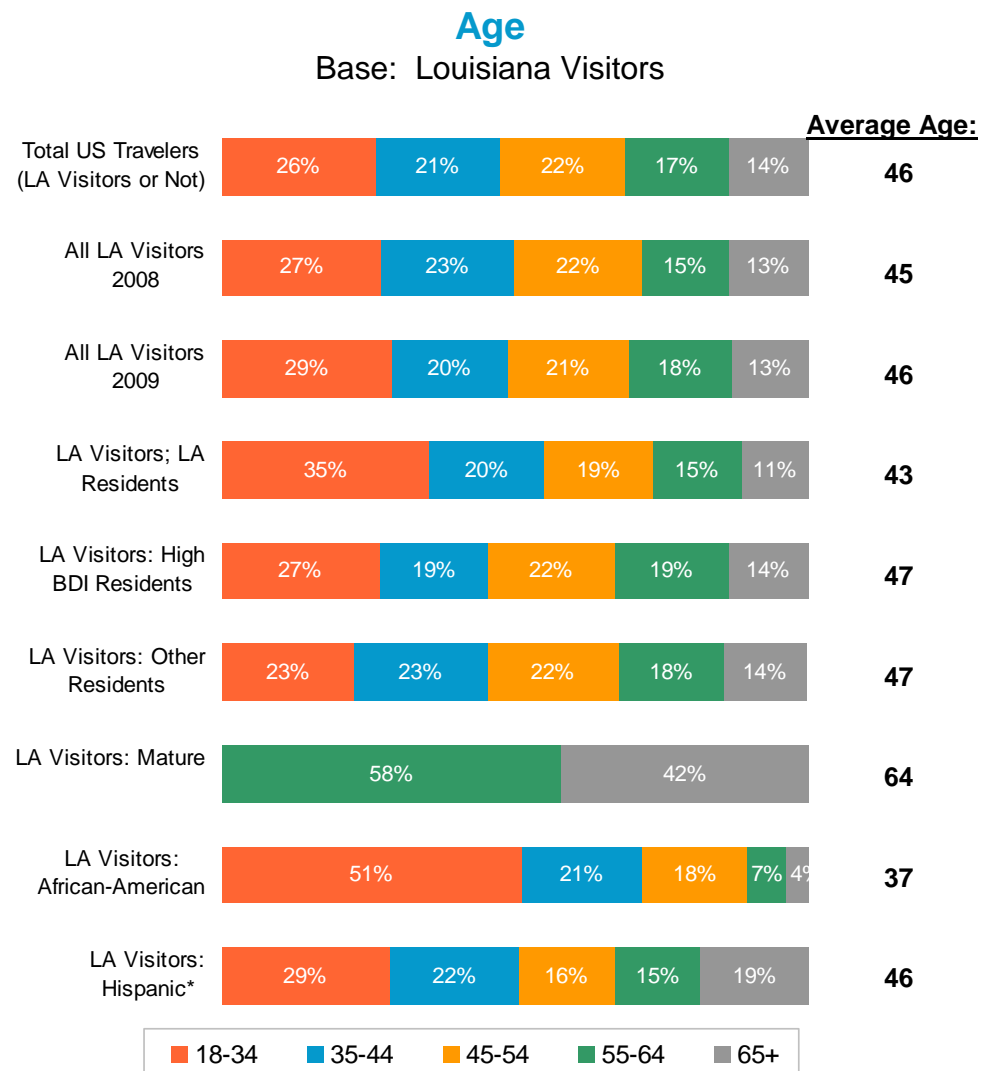


Visitor age

Age varies somewhat by segment

Consistent with 2007 and 2008, Louisiana visitors essentially match other US travelers in age (46). Further:

- Also mirroring prior years, the youngest visitors continue to be African-American (37) and those who live in the state (43)
- The Mature market (64) is older, by definition, and visitors who live outside the state of Louisiana are also slightly older.



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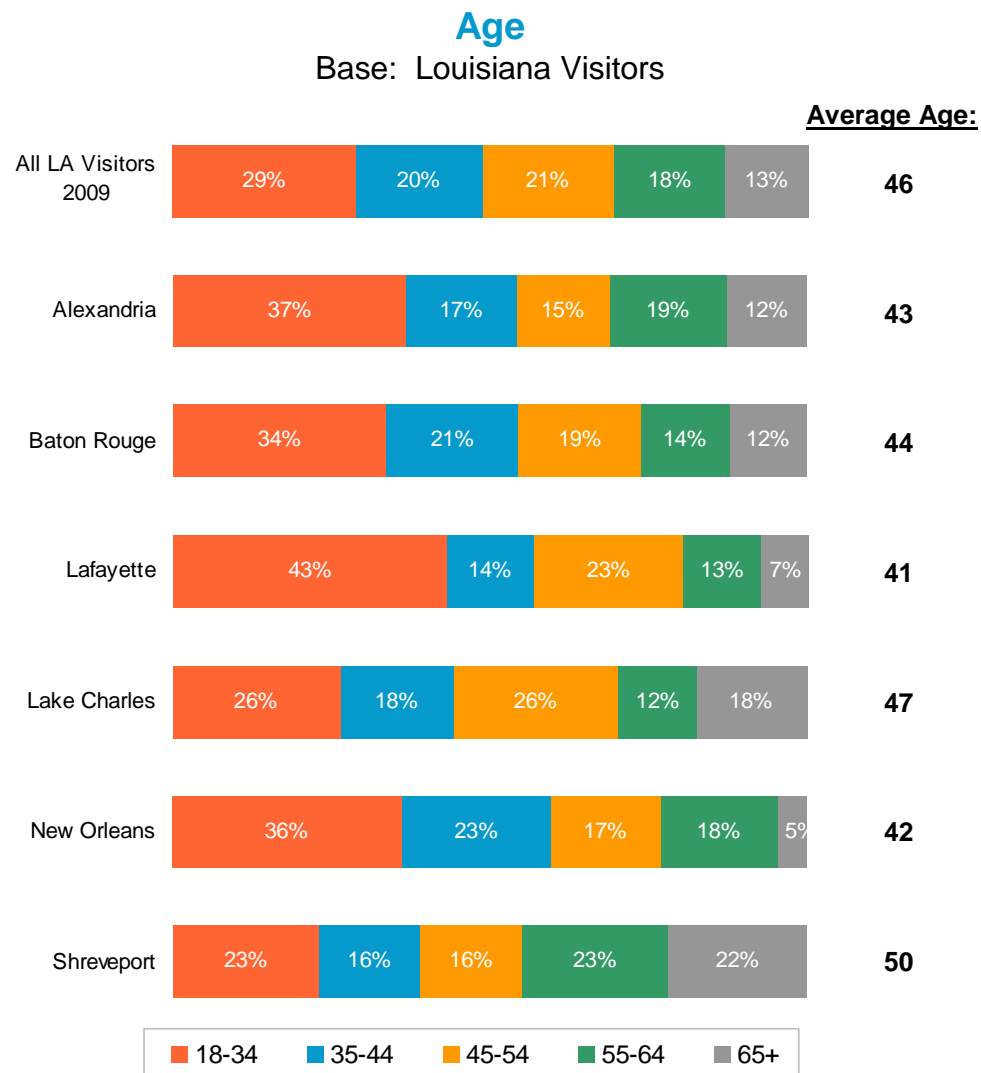
QD: How old are you? (Household Level-demo wtd) // *Caution: Small base size n=17

Visitor age by destination

Age varies somewhat by destination

While Louisiana visitors, in general, fall into similar age groups as total US travelers, destinations vary considerably:

- Lake Charles and Shreveport attract the oldest visitors, who also note greater participation in gaming (shown later)
- Younger visitors choose Lafayette, New Orleans, and Alexandria.

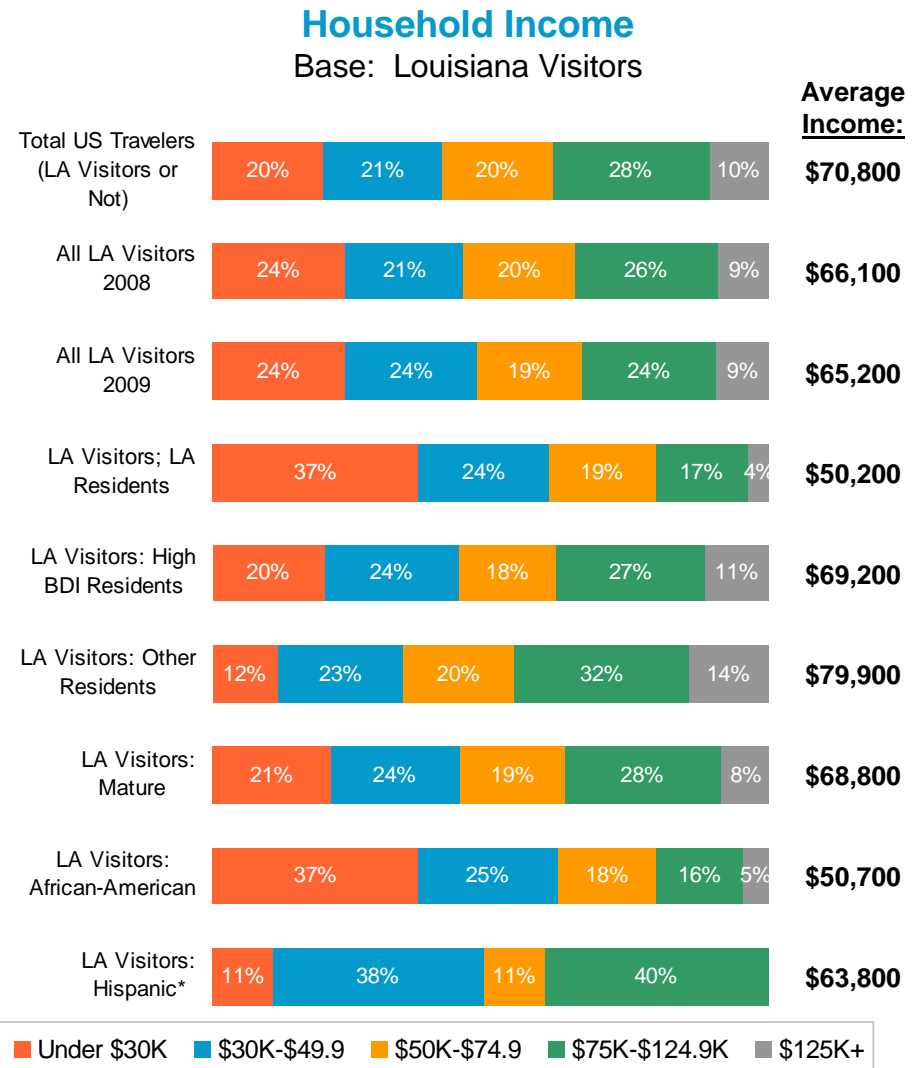


Visitor income

Income varies widely by segment, but remains near last year

Louisiana visitors report similar, but slightly lower incomes than in 2008 (\$65,200 vs. \$66,100) and continue to lag typical US travelers (\$70,800). In addition:

- Not surprisingly, those traveling the farthest (reside outside of Louisiana and the High BDI Marketing Area) and thus able to incur the greatest travel costs, report the highest incomes (\$79,900); residents in the High BDI Marketing Area rank second (\$69,200)
- In-state visitors and African Americans rank last at \$50,200 and \$50,700 respectively
- Mature visitors' incomes (\$68,800) somewhat exceed the Louisiana average.



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Panel: Income (Household Level-demo wtd) // *Caution: Small base size n=17

Visitor income by destination

Income varies by destination

While Louisiana visitors' incomes lag typical US travelers, some destinations draw more affluent visitors than others:

- New Orleans attracts more affluent visitors, exceeding the average US traveler (\$78,300 vs. \$70,800) as well as the average Louisiana visitor (\$66,100)
- Lake Charles ranks second
- Alexandria and Lafayette visitors earn less than visitors to other areas.



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Panel: Income (Household Level-demo wtd)

Louisiana visitor characteristics

Characteristics vary by segment, but generally reflect US travel patterns

- The greatest difference between Louisiana visitors and total US travelers occurs in ethnicity: 17% of Louisiana visitors are African-American, more than twice the national average (7%), with similar results for Louisiana visitors living in-state (18%) or residing in High BDI markets (19%)
- Lower marriage rates appear among Louisiana visitors who are residents (55%), African-American (37%), or Hispanic (47%) than average Louisiana visitors (61%)
- African-American (40%) and Hispanic (41%) visitors most often live with children
- African-American visitors are most likely to live alone (33%), Hispanics least likely (12%).

Gender, Marital Status, Household Composition, Ethnicity

Base: Louisiana Visitors (except the first column)

Other Demographics	Total US Travelers	Louisiana Visitors	From Louisiana	From High BDI	From Elsewhere	Mature	African-American	Hispanic*
% Male	39%	41%	34%	43%	46%	49%	29%	55%
% Married	61	61	55	63	65	67	37	47
Household Composition								
% One Person	21%	23%	24%	23%	21%	24%	33%	12%
% Two People	36	38	35	38	43	59	23	30
% Three or More	44	39	41	39	37	17	44	59
% With Children < 18	35	32	35	32	28	10	40	41
Ethnicity								
% Caucasian	86%	80%	80%	77%	84	92%	na	na
% African-American	7	17	18	19	11	6	100	na
% Hispanic	4	2	2	1	3	2	na	100



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QE: Please indicate your gender.

Panel: Marital Status, Household Members, Children, Ethnicity. (Household Level-demo wtd)

* Caution: Small base size n=17

Louisiana visitor patterns – continued

Characteristics vary by segment

- Most Louisiana visitor groups place near the national full time employment average (65%) except for those in the Mature group, where half have retired
- In general, fewer Louisiana visitors have college degrees than the national average (38% vs. 45%) and the difference increases among Louisiana residents (34%); visitors who live outside Louisiana and the High BDI Marketing Area (“From Elsewhere”) indicate above average formal education (53%)
- Those traveling greater distances (“From Elsewhere”) are more likely than others to classify as Future Shapers/Makers (38%); in contrast, the Mature group more often qualifies as Today or Yesterday/Yesteryear consumers.

FutureView (Psychographics), Employment, Education

Base: Louisiana Visitors

Other Demographics %	Total US Travelers	Louisiana Visitors	From Louisiana	From High BDI	From Elsewhere	Mature	African-American	Hispanic*
FutureView								
% Shapers/Makers	31%	33%	29%	33%	38%	25%	39%	39%
% Today Consumers	39	37	38	38	34	40	31	23
% Yesterday/Yesteryear	28	29	30	28	28	35	28	31
Employment								
% Full Time	65%	63%	62%	64%	63%	37%	68%	56%
% Retired	16	17	16	19	17	50	7	11
% Other	19	20	22	17	20	13	25	33
Education								
% 2 yr College or Less	55%	62%	66%	67%	47%	62%	66%	56%
% 4 yr College Grad +	45	38	34	33	53	38	34	44



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FutureView and Panel: Employment, Education. (Household Level-demo wtd)

* Caution: Small base size n=17

Louisiana visitor characteristics by destination

Characteristics often vary from total Louisiana visitors (summary):

- Alexandria visitors: Younger, lower incomes, fewer married, more live with 3+ others and with children, above average with African-American heritage, fewer with college degrees
- Baton Rouge visitors: Slightly younger, more live with 3+ others and with children
- Lafayette visitors: Youngest of destination visitors, lower incomes, fewer married, more African-American heritage
- Lake Charles: Generally average except more live with children, more Caucasians, and more retirees
- New Orleans: Younger, more affluent, more formal education
- Shreveport: Older, somewhat lower incomes, more retirees.

Gender, Marital Status, Household Composition, Ethnicity

Base: Louisiana Visitors (except the first column)

Other Demographics	Total US Travelers	Louisiana Visitors	Alexandria	Baton Rouge	Lafayette	Lake Charles	New Orleans	Shreveport
% Male	39%	41%	30%	28%	44%	47%	41%	44%
% Married	61	61	53	62	51	62	57	62
Household Composition								
% One Person	21%	23%	18%	19%	38%	26%	23%	21%
% Two People	36	38	39	24	20	32	38	36
% Three or More	44	39	43	57	42	42	39	43
% With Children < 18	35	32	41	45	33	46	35	35
Ethnicity								
% Caucasian	86%	80%	70%	77%	74%	81%	76%	79%
% African-American	7	17	22	19	24	12	19	20
% Hispanic	4	2	2	2	0	3	3	2



Louisiana visitor patterns by destination – continued

FutureView (Psychographics), Employment, Education

Base: Louisiana Visitors

Other Demographics %	Total US Travelers	Louisiana Visitors	Alexandria	Baton Rouge	Lafayette	Lake Charles	New Orleans	Shreveport
FutureView								
% Shapers/Makers	31%	33%	39%	36%	36%	35%	37%	39%
% Today Consumers	39	37	28	35	36	42	38	34
% Yesterday/Yesteryear	28	29	28	28	23	24	24	27
Employment								
% Full Time	65%	63%	60%	64%	69%	58%	74%	47%
% Retired	16	17	20	13	12	31	5	31
% Other	19	20	20	23	19	11	21	22
Education								
% 2 yr College or Less	55%	62%	80%	64%	66%	64%	49%	64%
% 4 yr College Grad +	45	38	20	36	34	36	51	36



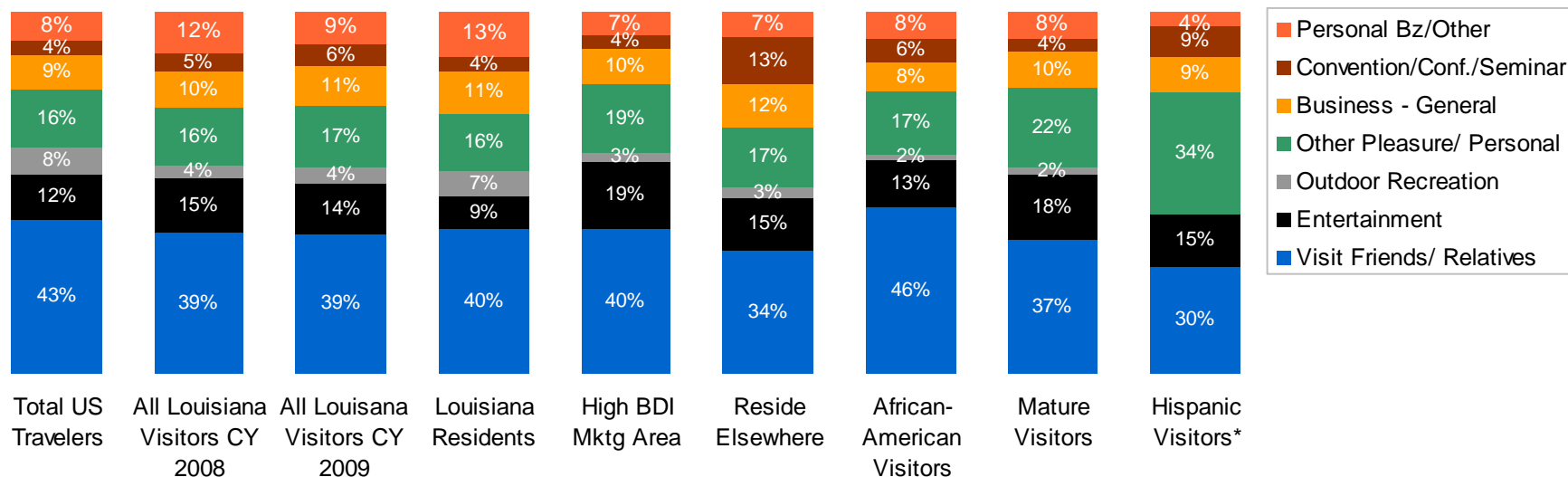
Trip Characteristics and Satisfaction

Trip purpose

Visitors usually come to Louisiana for fun

- Most visitors primarily come to Louisiana to *visit friends and family* (39%), similar to both last year and Total US Travelers; African-American visitors, especially, come for that purpose (46%)
- Mature visitors and those residing in High BDI marketing areas cite *entertainment* as their reason for visiting more often than average
- Business* travel, while still a relatively small percentage, is more prevalent among those who reside farther away ("Reside Elsewhere") and is relatively stable (25% vs. 27% in CY 2008 and 22% in 2007) among that group.

Primary Purpose of Trip



79%	74%	74%	72%	80%	68%	78%	79%	78%	= Net Leisure
13%	15%	17%	15%	14%	25%	15%	14%	18%	= Net Business



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Q1b. Which of the following was the primary purpose of your trip. . . (Trip Level – demo wtd)

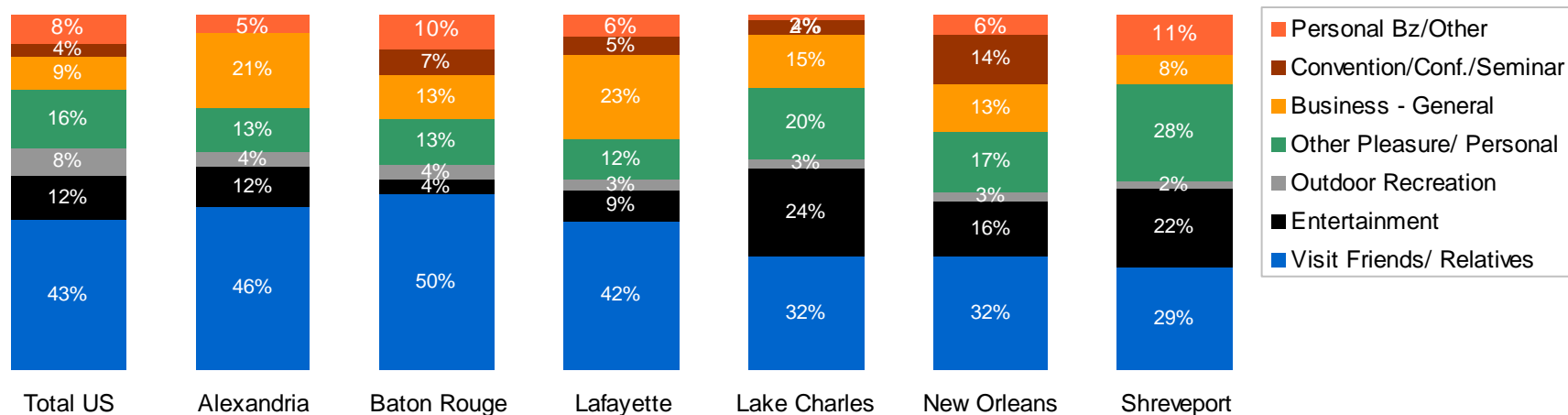
* Caution: Small base size (n=17)

Trip purpose by destination

Visitors usually come to Louisiana for fun

- Business visits occur more often in New Orleans, especially conventions, and Lafayette than elsewhere
- Gaming participation (shown later) ranks highest in Shreveport and Lake Charles; both lead in entertainment as well
- Tourism in Alexandria, Baton Rouge, and Lafayette relies more heavily on visits to friends and family than other Louisiana areas.

Primary Purpose of Trip



79%	74%	70%	65%	79%	67%	80%	= Net Leisure
13%	21%	20%	29%	19%	27%	8%	= Net Business



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Q1b. Which of the following was the primary purpose of your trip. . . (Trip Level – demo wtd)

Purpose and accommodations

Visitors often see friends and relatives and stay with them

- Compared to business travelers, leisure travelers more often: drive, stay with friends/relatives, and travel with children
- Not surprisingly, business travelers fly more frequently, stay longer, and usually pay for lodging (hotel/motel)
- About a third of business visitors fly (34%) – three times the rate of leisure visitors
- Nearly the same proportion of business (37%) and leisure visitors live in-state (36%).

LOUISIANA VISITORS Trip Choices (Trip Level)	Total 2008	Total 2009	Leisure	Business
PRIMARY TRIP PURPOSE				
NET Leisure/Personal	74%	74%	100%	0%
Visit Friends/Relatives	39	39	52	0
Entertainment/Sightsee	15	14	19	0
NET Business	15	17	0	100
Personal Bs/Other	12	9	0	0
PRIMARY MODE				
% Own Auto/Truck	74%	73%	78%	54%
% Air Travel	14	15	11	34
AVG # IN TRAVEL PARTY	2.8	2.8	3.0	1.8
% Traveling Solo	28%	28%	21%	66%
% Traveling With Children	26	24	29	4

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level – demo wtd)

LOUISIANA VISITORS Lodging (State Level)	Total 2008	Total 2009	Leisure	Business
AVG # NIGHTS (if any)	3.1	3.0	2.8	3.8
Private Home	1.4	1.1	1.3	0.1
Hotel/Motel	1.3	1.4	1.1	2.8
All Other	0.2	0.3	0.3	0.9

Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).

Overnight stays

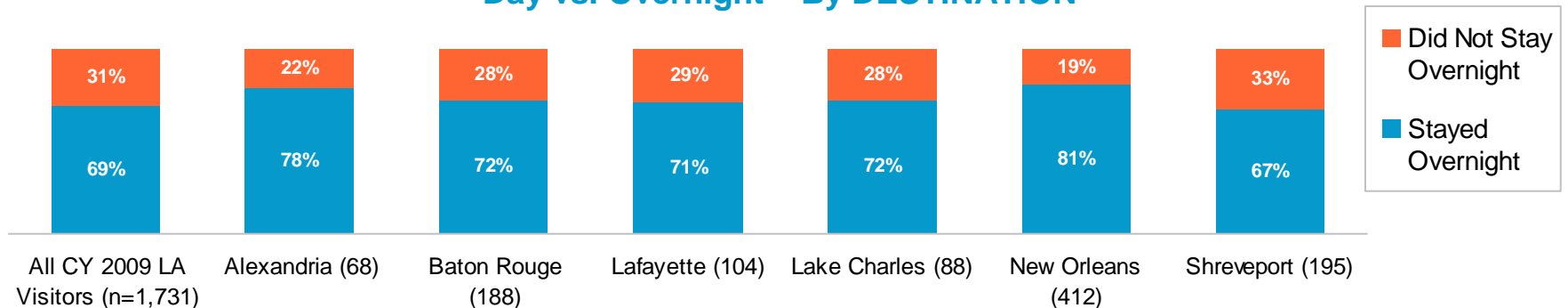
Most visitors spend at least one night, unless they live in-state

- 7 in 10 Louisiana visitors stay overnight, at parity with other US travelers and last year
- Logically, those who live in-state are most likely to take a day-trip (50%); conversely, those who travel the greatest distance are most likely to stay overnight (83%)
- As might be expected among the cities, New Orleans visitors most often spend the night (81%).

Day vs. Overnight – By SEGMENT



Day vs. Overnight – By DESTINATION

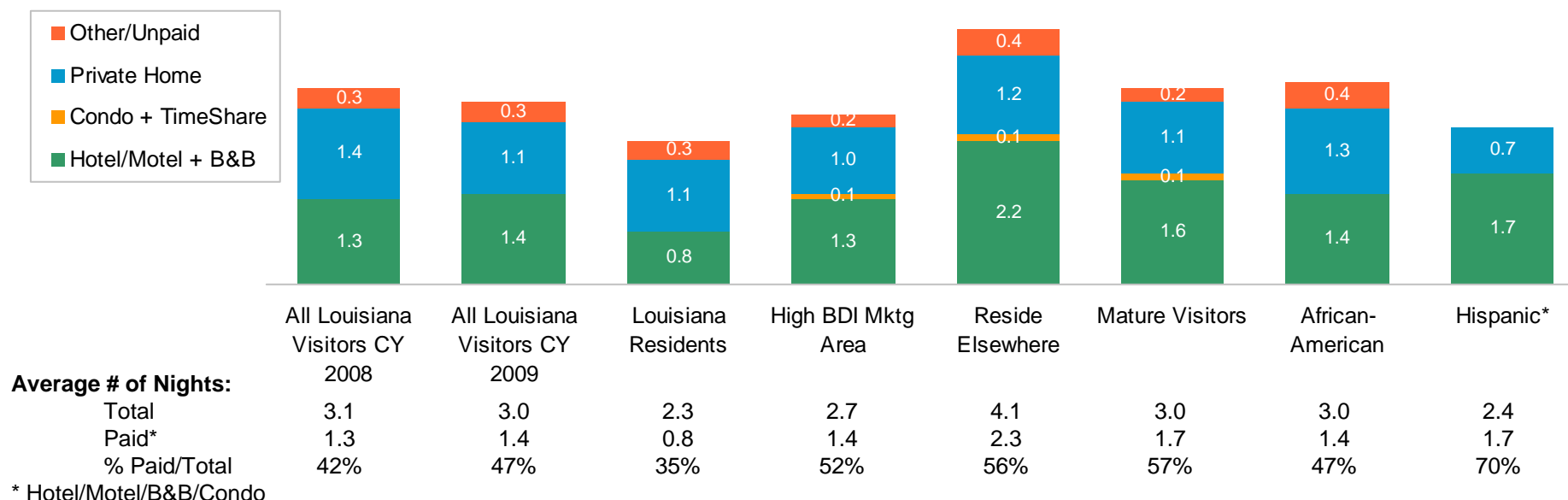


Accommodations by segment

Fewer than half (47%) pay for accommodations

- The largest share of Louisiana visitors come to see friends/family and many stay with them rather than in hotels/motels/B&Bs/condos
- As shown previously, Louisiana residents are least likely to take an overnight trip in Louisiana; even when they do, they spend fewer nights (2.3) and few of those (35%) in paid accommodations
- Those traveling farthest, living outside of Louisiana and the High BDI marketing area, stay the longest (4.1 nights) and more often opt for hotels/motels
- African-Americans stay in a private home more nights than any other segment.

Length of Stay
Base: Overnight Visitors



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Q4f. Abridged: Of the overnights in Louisiana, specify the number stayed at each accommodation (State Level)

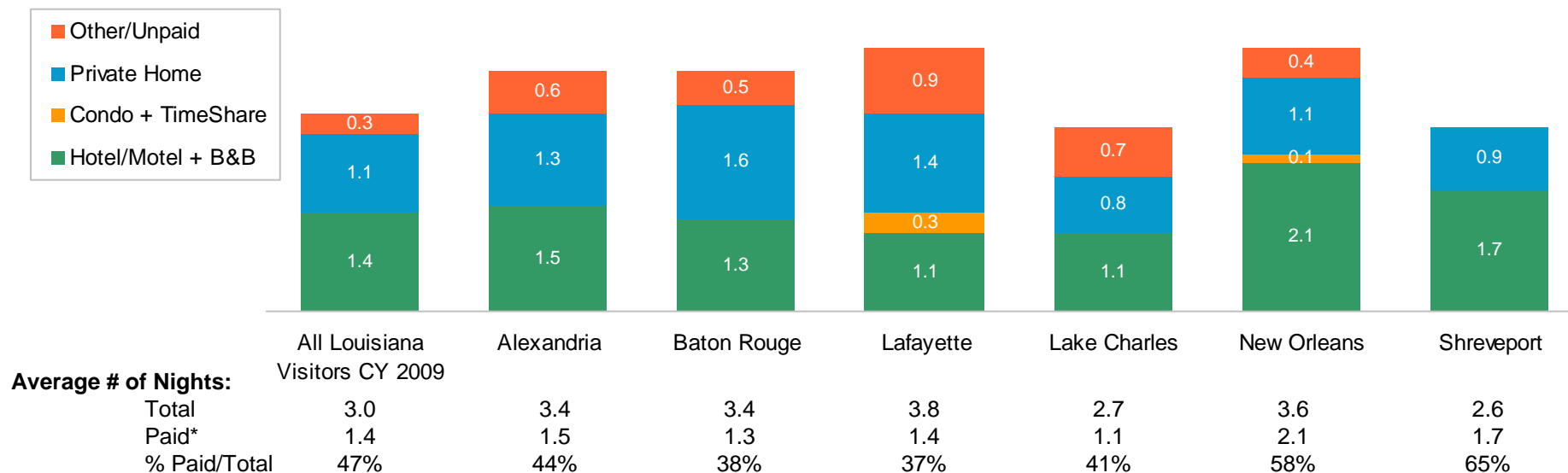
* Caution: Small base size (n=17)

Accommodations by destination

Visitors stay longer in New Orleans and Lafayette

- Not only does New Orleans attract more overnighers (earlier slide), but they stay longer as well and more often opt for hotels
- Consistent with the purpose of trip (more who visit friends and relatives), Alexandria, Baton Rouge, and Lafayette guests more often stay in private homes.

Length of Stay
Base: Overnight Visitors



* Hotel/Motel/B&B/Condo



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Q4f. Abridged: Of the overnights in Louisiana, specify the number stayed at each accommodation (State Level)

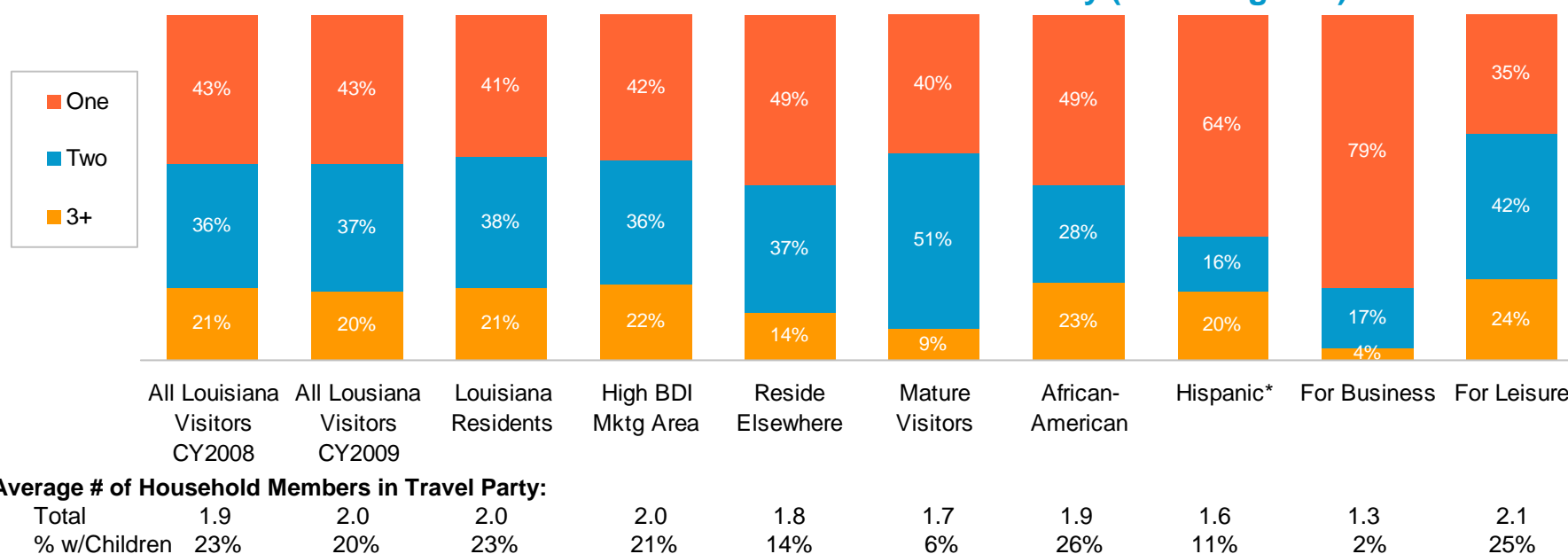
43

Travel companions by segment

Visitors often travel solo or in pairs* (few families with children)

- Not surprisingly, Business travelers (79%) are the most likely to travel alone, followed by those living outside of the High BDI area (49%) who, as shown earlier, also tend to be heavier business travelers
- Mature visitors also tend toward smaller travel parties, only 9% travel in groups of 3 or more
- While the African-American travel party size is similar to other Louisiana visitors (1.9 vs. 2.0), relatively few travel in pairs (28%). This group has an above average tendency toward traveling alone (49%) and with 3 or more people (23%). They are also the most likely to travel with children (26%).

Number of Household Members in Travel Party (Including Self)



*NOTE: The travel party could include non-household members, which theoretically, would be covered by another household. The proportion traveling in pairs may be somewhat lower than expected because "couples" who are not married or living together would respond as "one."



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Q3b. Of travelers, how many live in your household, including yourself (Household State Level – demo wtd)

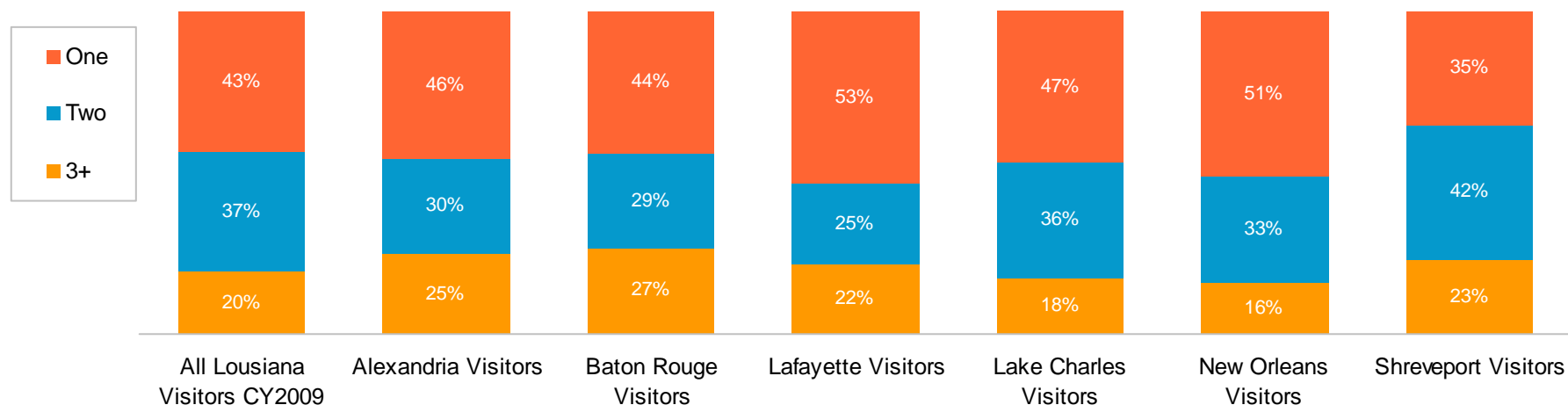
* Caution: Small base size (n=17)

Travel companions by destination

New Orleans draws the fewest families with children

- More family traveler groups (with children) go to destinations where the primary purpose is to visit friends and relatives, especially Alexandria and Baton Rouge
- New Orleans tends to attract adults who, as shown later, indicate greater interest in history/museums, nightlife/dining, and special events
- Lake Charles also attracts adults, where a larger proportion of visitors cite gaming as an activity pursued.

Number of Household Members in Travel Party (Including Self)



Average # of Household Members in Travel Party:

Total	1.9	1.9	2.1	1.9	1.9	1.8	2.1
% w/Children	20%	33%	27%	23%	18%	17%	23%

*NOTE: The travel party could include non-household members, which theoretically, would be covered by another household. The proportion traveling in pairs may be somewhat lower than expected because "couples" who are not married or living together would respond as "one."



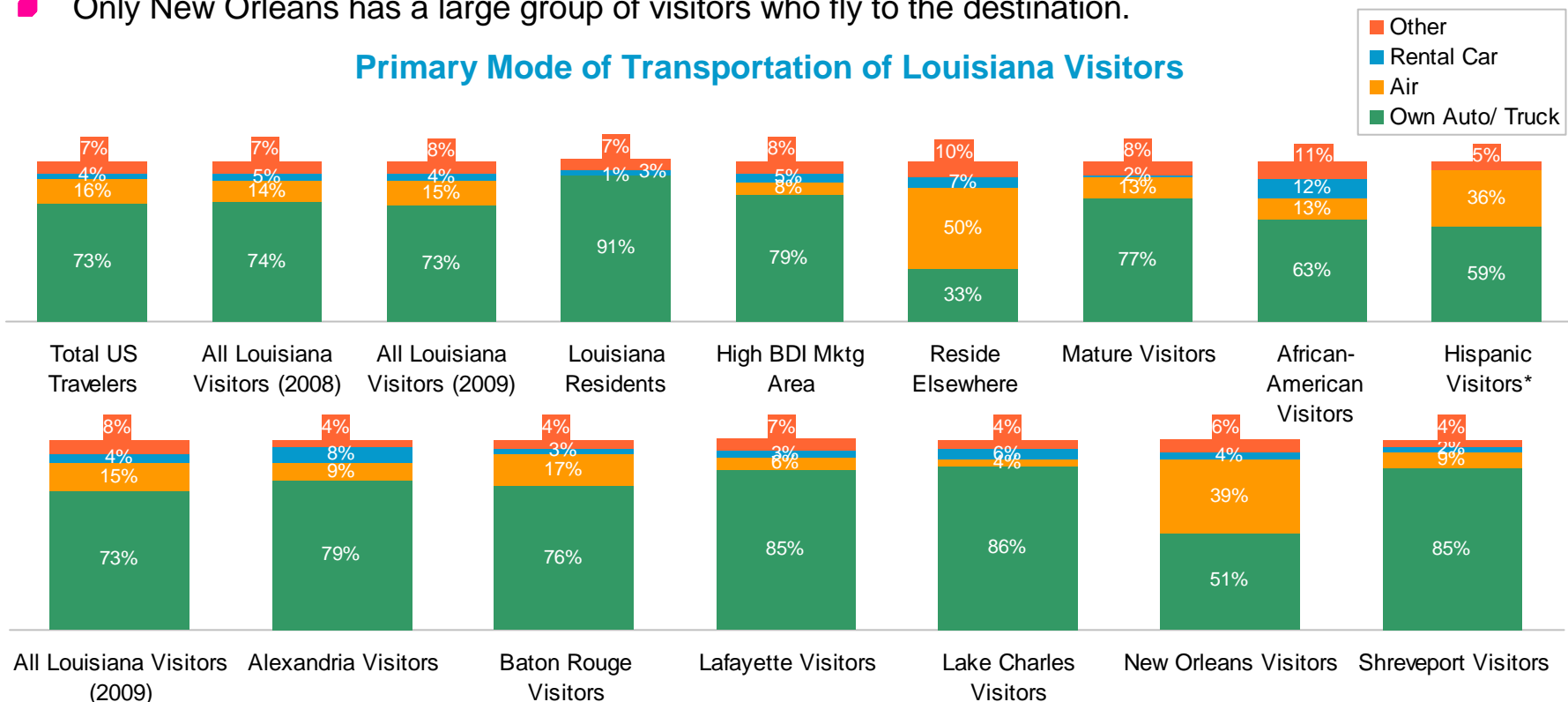
Primary mode of transportation

Most travelers drive to their destination

Although overall Louisiana visitors choose transportation modes similar to total US travelers, distance notably affects transportation choice:

- As expected, Louisiana residents drive more often to in-state destinations than any other segment
- Conversely, residents outside both the state and the High BDI Marketing Area fly most often
- As noted last year, African-Americans rent a car to visit Louisiana more often than others
- Only New Orleans has a large group of visitors who fly to the destination.

Primary Mode of Transportation of Louisiana Visitors



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Q2b. Abridged: Which was the primary mode of transportation used for your trip . . . (Household Level – demo wtd)

* Caution: Small base size (n=17)

Trip timing

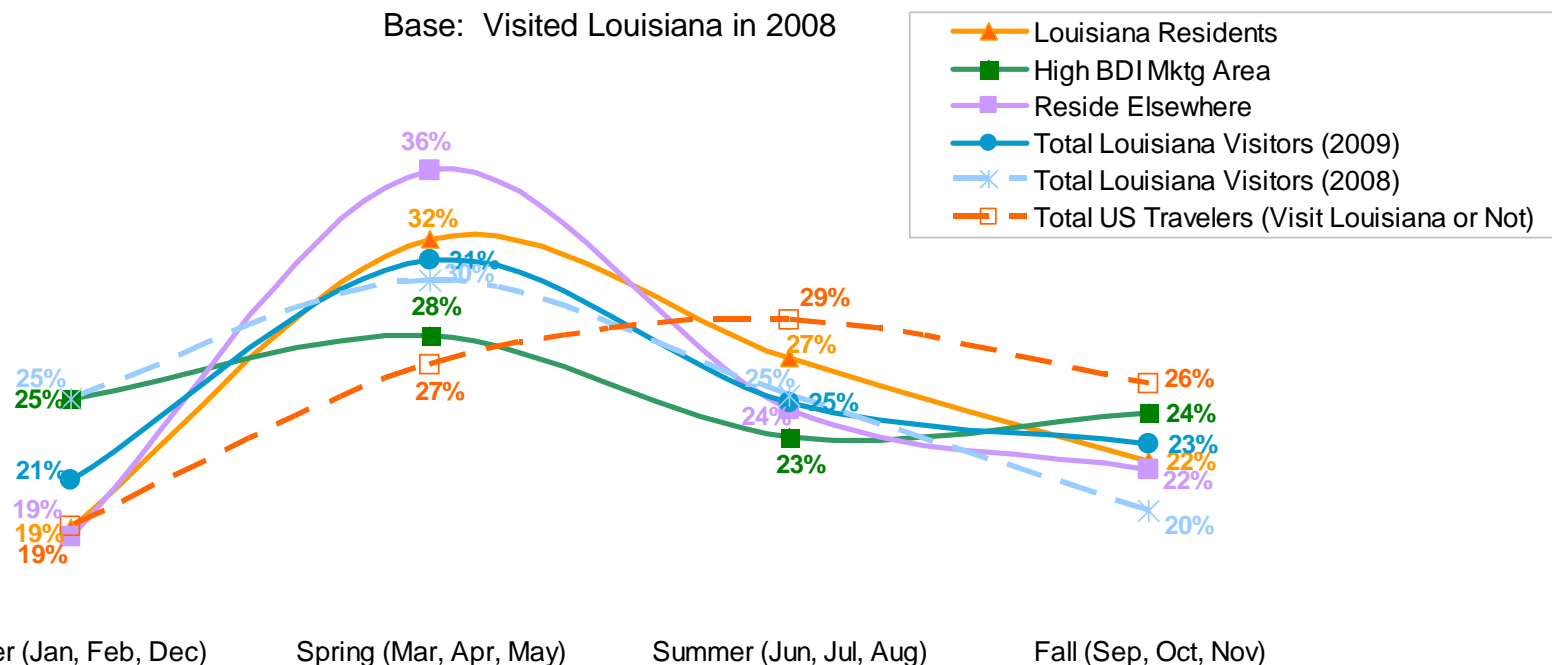
Nationally, most travel occurs in Summer

In contrast, Louisiana visitors more often prefer the Spring:

- Louisiana residents most frequently travel within the state in **Spring** and, secondarily, in the **Summer**
- Those living in the High BDI Marketing Area are most likely to visit in the **Spring** and appear to avoid **Summer**
- Those living elsewhere opt to visit in the **Spring** while **Summer** and **Fall** vie for a distant second place
- Compared to a year ago, a higher proportion came during the Fall of 2009 than in Fall 2008 – suggesting some recovery from the 2008 financial crisis.

TIMING OF TRIP BY SEASON

Base: Visited Louisiana in 2008



Winter (Jan, Feb, Dec)

Spring (Mar, Apr, May)

Summer (Jun, Jul, Aug)

Fall (Sep, Oct, Nov)

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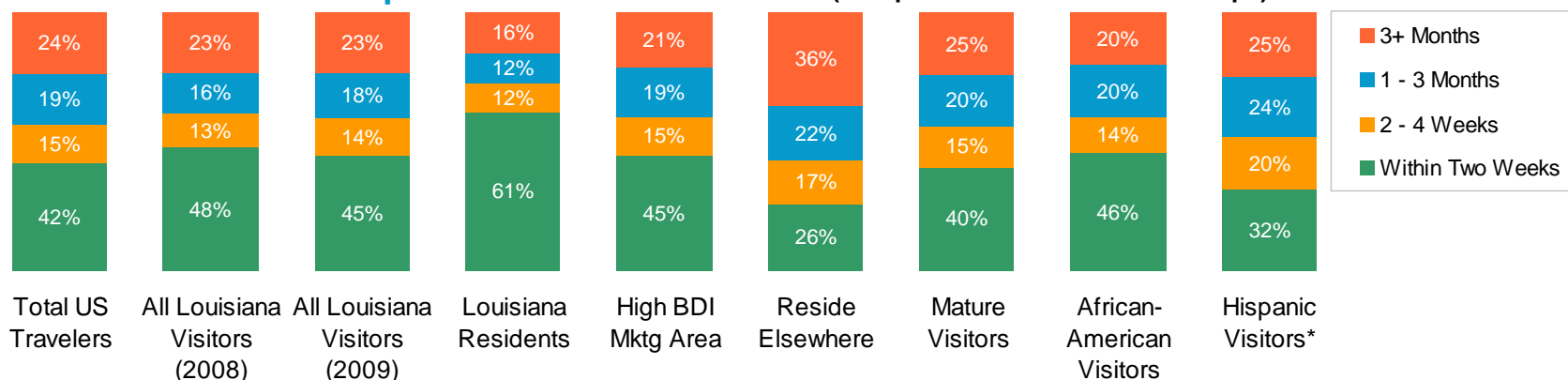
Month Traveled (wave of questionnaire) (Household Level)

Trip planning – timing by segment

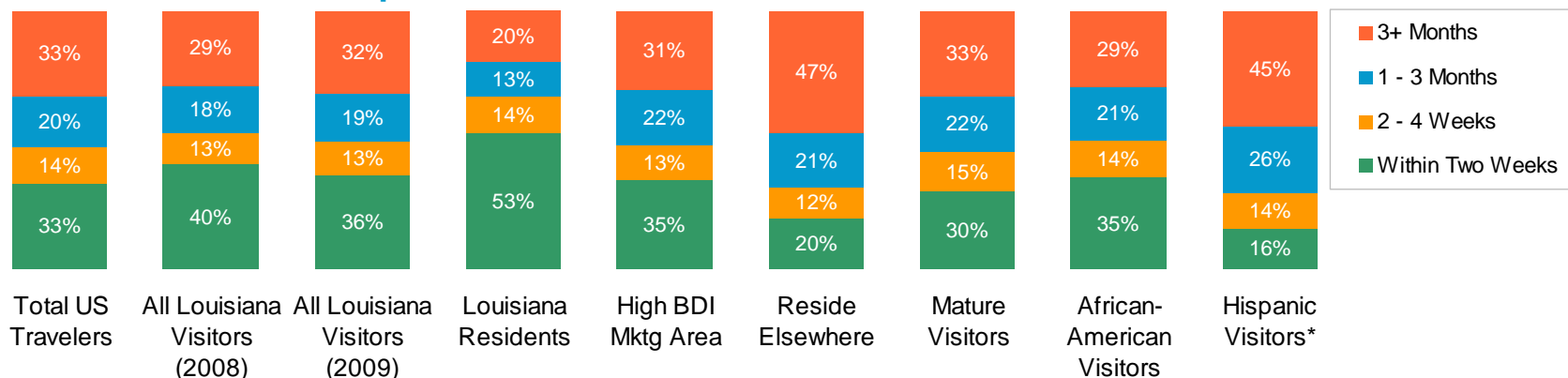
Logical patterns occur for trip planning

- With fewer spending the night, in-state visitors consider and decide to take relatively spontaneous trips
- Conversely, those traveling from farther distances (reside elsewhere) have longer planning horizons
- Mature visitors also tend toward slightly longer planning periods.

Time Decided On Trip Before Visit to Louisiana (except Total US Travelers = all trips)



Time Considered Trip Before Visit to Louisiana (except Total US Travelers = all trips)



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Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)

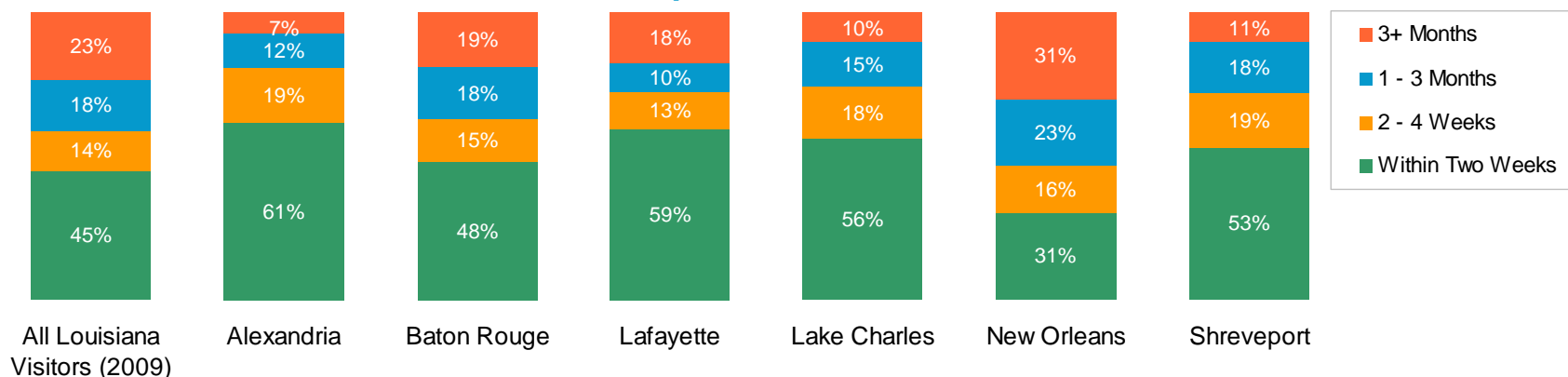
* Caution: Small base size (n=17)

Trip planning – timing by destination

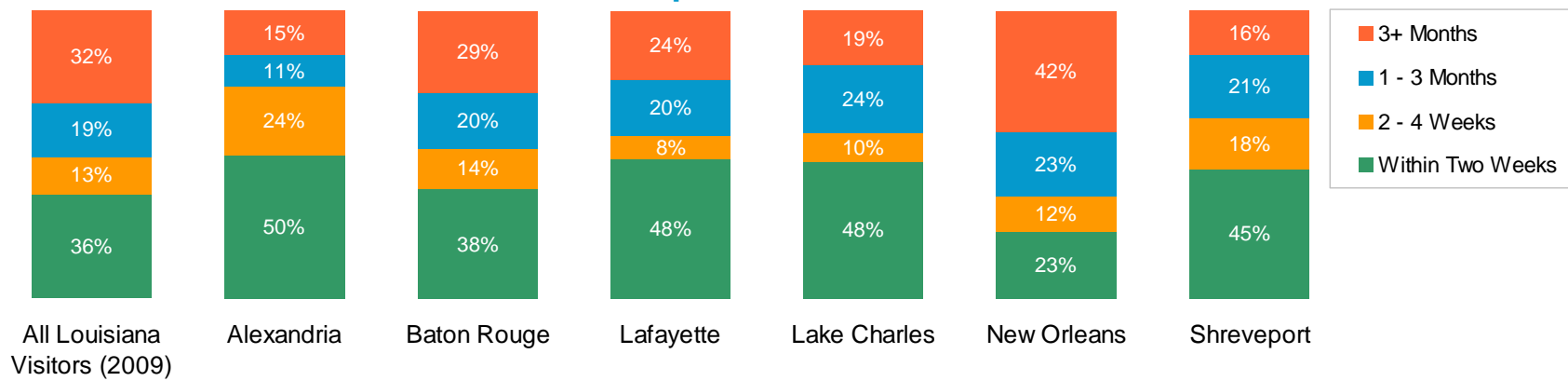
Trip planning relates to distance from primary source markets

- New Orleans visitors take longer to plan and decide on a trip, as is logical for the destination that has the highest proportion (39%) living outside the Louisiana and High BDI areas
- Alexandria hosts the largest share of the more spontaneous visitors (61% decide with two weeks).

Time Decided On Trip Before Visit to Louisiana



Time Considered Trip Before Visit to Louisiana



Trip planning – information sources

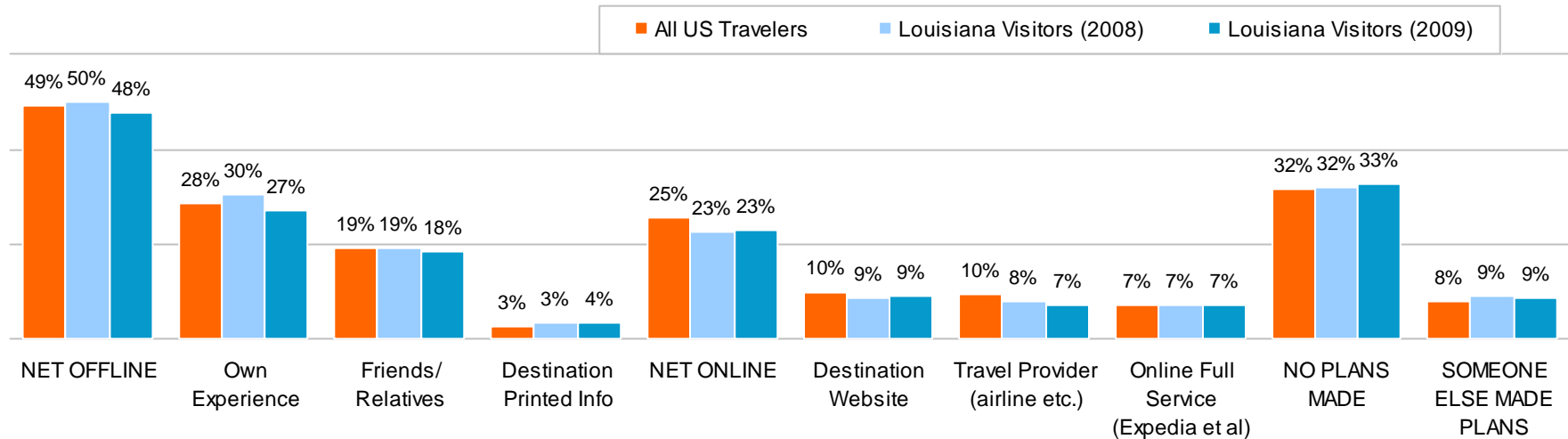
Louisiana visitors mirror overall US travelers in gathering information

Similar to total US travelers and similar to last year as well, Louisiana planners rely on their past experience and word of mouth as key sources of information, both of which are more difficult to influence than media advertising:

- Although the Internet is a popular place to gather information (25% all travelers vs. 23% for Louisiana visitors), just 1 in 10 currently use destination websites
- Printed information (3%) has minimal reach and impact
- A third of leisure travelers (32% - 33%) do not recall “making plans.”

Information Sources to Plan a Trip

Ranked by All Sources (5%+)



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Q4j. What sources did you use in planning your trip to . . . (State Level – demo wtd)

Trip booking methods

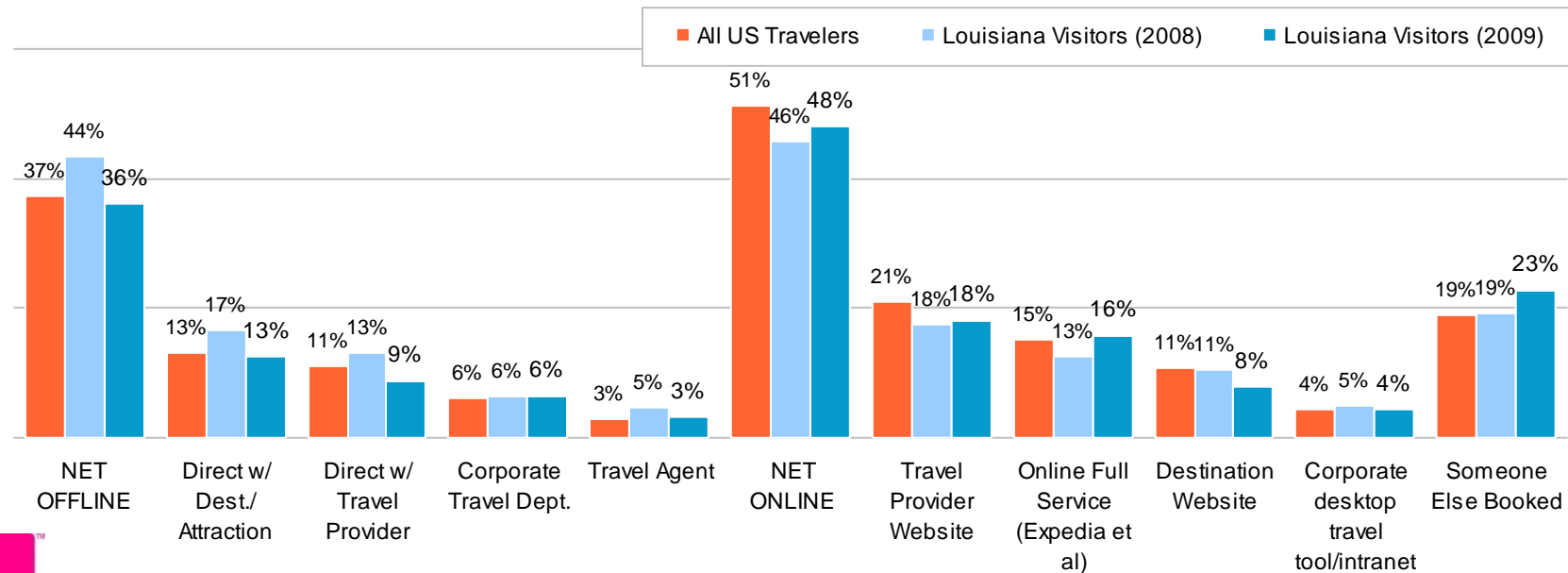
Booking becomes more reflective of US travelers than in the past

Gathering information from similar sources, Louisiana visitors book their trip components similarly to US travelers:

- Travelers do more *online* trip booking than *offline* in general (51% vs. 37%) and for Louisiana visitors (48% vs. 36%) – a change from last year where the Louisiana visitors more evenly split the overall methods (46% online; 44% offline) and suggests that Louisiana visitors may be becoming more Internet-reliant
- Further, *travel provider website - online* (18%) leads as the top booking method among Louisiana visitors.

Method Used to Book Trip Components

Ranked by All Sources (5%+)



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Q4k. Please indicate the method(s) you used to book your trip . . . (State Level – demo wtd)

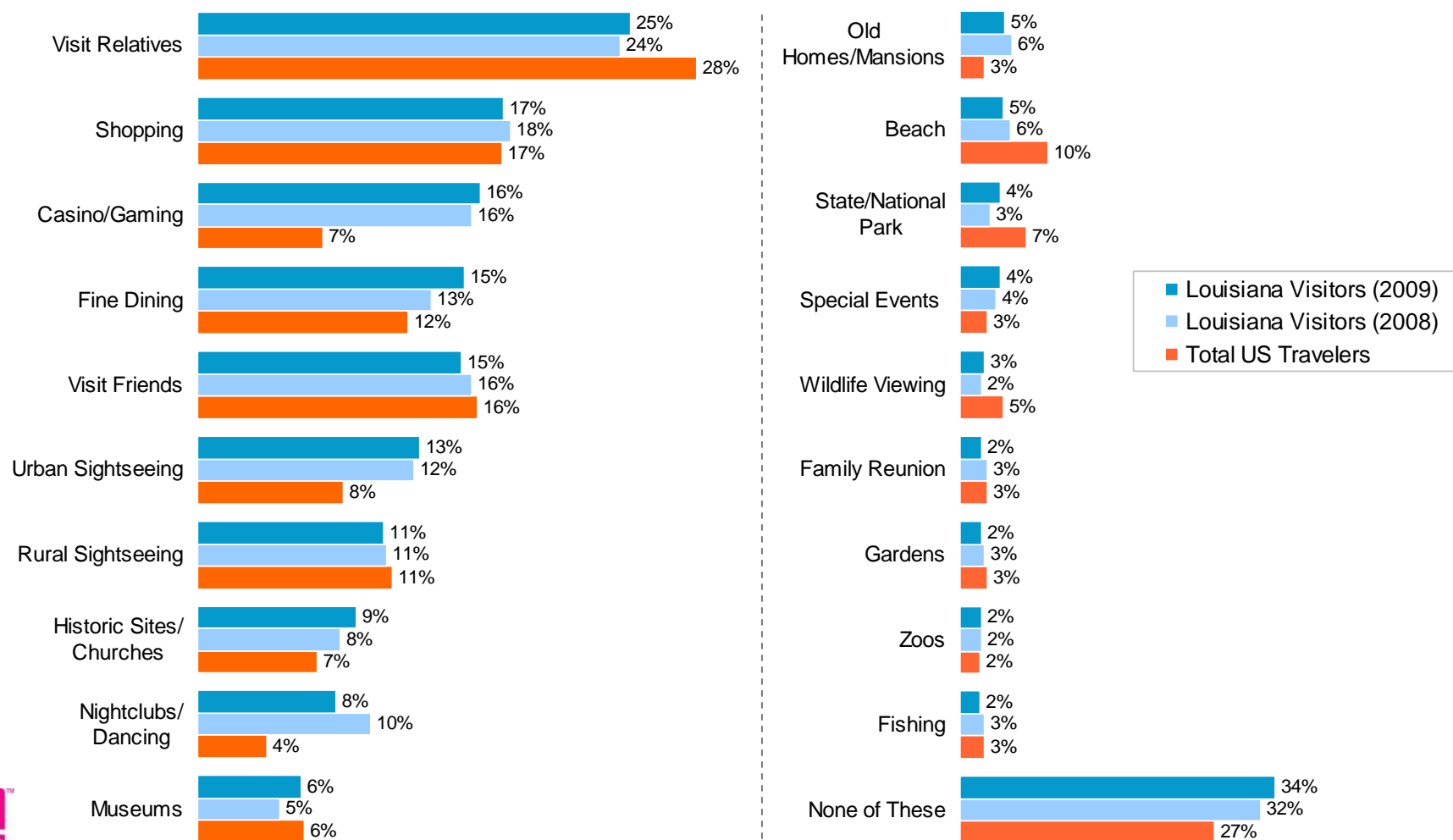
Trip characteristics: overall vacation activities

Louisiana visitors come to *visit, shop, gamble, and eat*

Compared to all US travelers, Louisiana visitors noticeably more often play casino games, sightsee in cities, and visit nightclubs.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with 2% or less for Total Louisiana Visitors not shown)



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Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

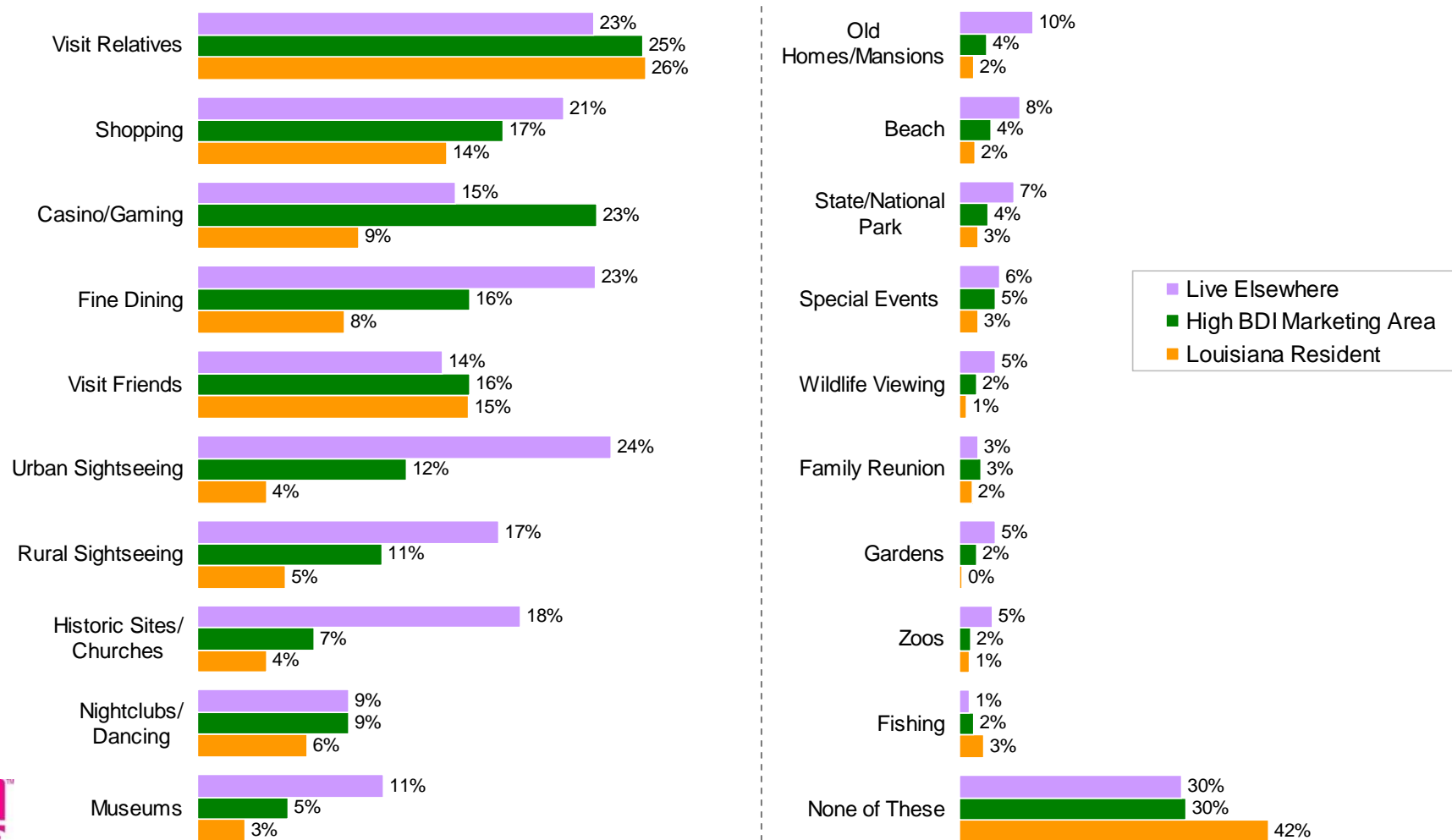
Trip characteristics: vacation activities by residence

In-state residents more often *visit relatives and friends*

However, they lag non-residents on nearly every other activity. High BDI Marketing Area residents gamble more often than others while those living further away take greater advantage of nearly all tourism features.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with 2% or less for Total Louisiana Visitors not shown)



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Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

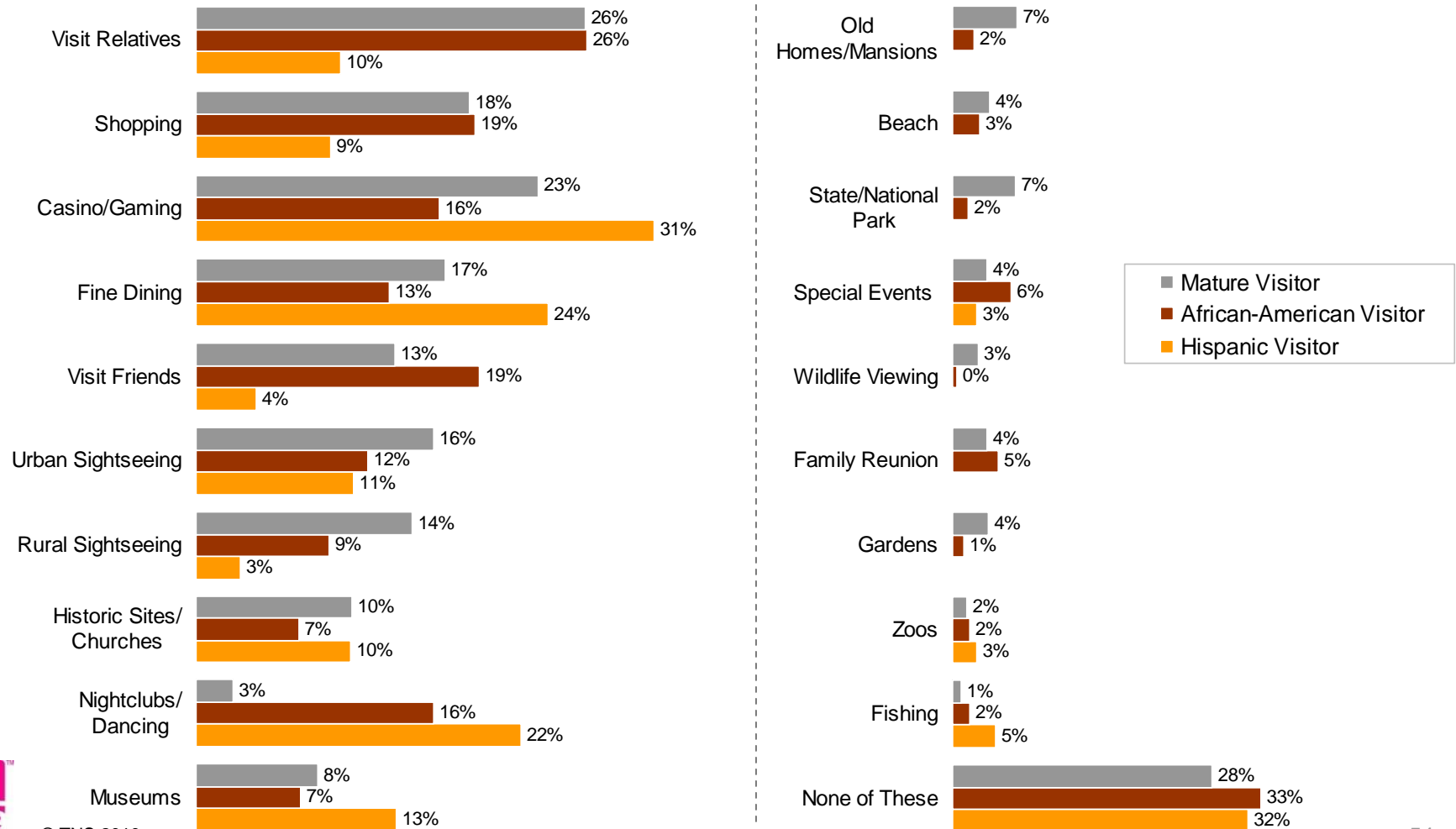
Trip characteristics: vacation activities by segment

Mature visitors *visit relatives and casinos and they shop*

African-Americans, consistent with their travel purpose, often *visit friends and relatives* while in Louisiana. They go to *nightclubs* as often as a *casino* (16%). Hispanics *game* more than any other activity – but the sample is small.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with 2% or less for Total Louisiana Visitors not shown)



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Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

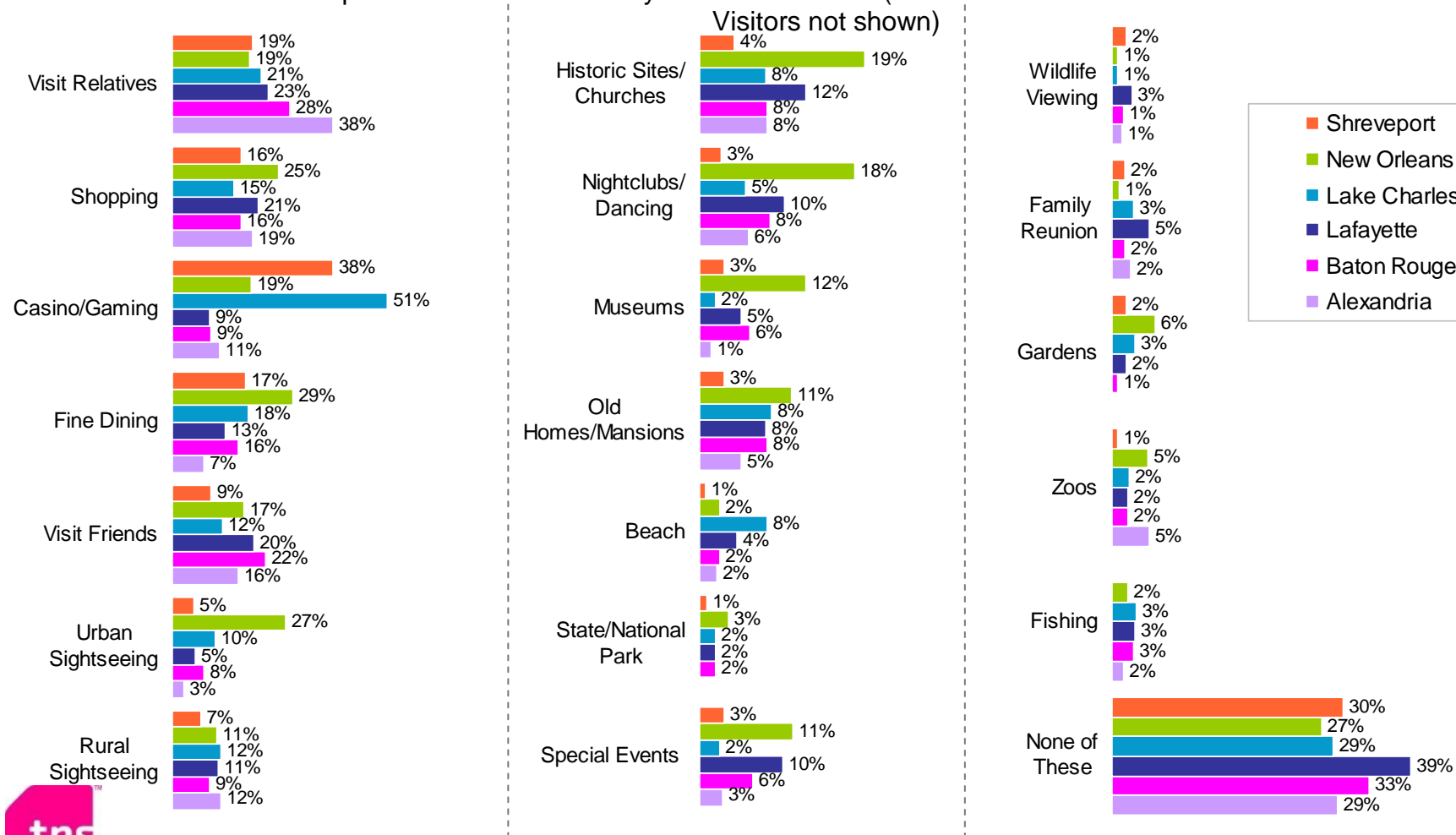
Trip characteristics: vacation activities by destination

Activities vary widely by destination

The most distinct destinations are New Orleans, which “owns” *history* and *museums*, *nightlife* and *dining*, and *special events*, and Lake Charles, which lures *casino/gaming* visitors.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with 2% or less for Total Louisiana)



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Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

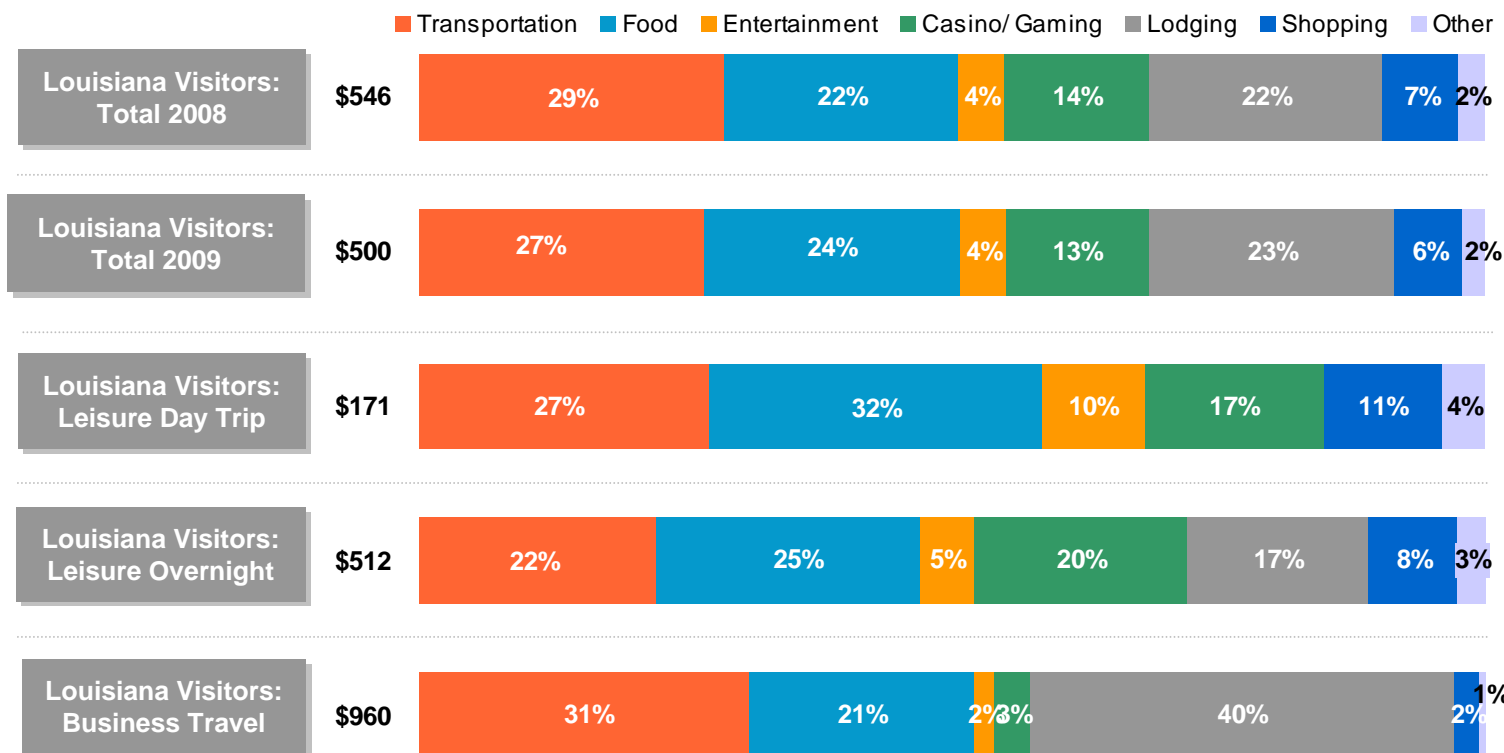
Trip expenditures by purpose

Visitor spending drops from last year

- Overnight visitors spend three times as much as day trip visitors (\$512 vs. \$171)
- Overnighters stay longer, of course, and allocate a large share of their travel budget for lodging
- Business travelers assign larger portions of their travel budget to lodging and transportation (consistent with their greater likelihood of flying).

Average Spending in Louisiana by Trip Type

Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Note 2: Not all respondents classified as business or leisure (personal business and other)

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Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

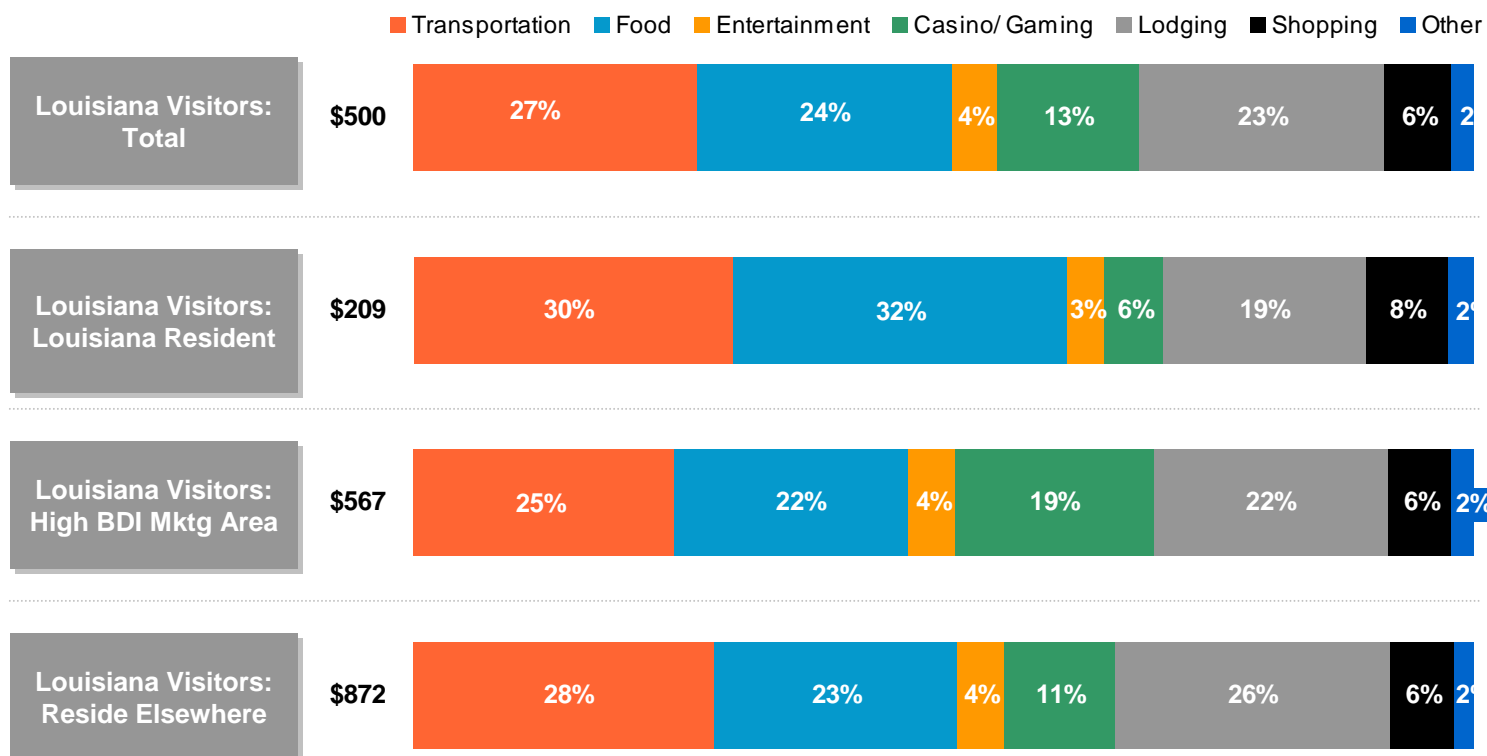
Trip expenditures by residence

Value of visitors climbs with distance traveled

- With greater distance, those outside the state and outside the High BDI Marketing area spend more of their travel budgets for lodging (26%) and transportation (28%, presumably many fly)
- High BDI Marketing Area residents spend the largest share (19%) on gaming, averaging \$362 (when non-gamblers are excluded)
- Food “consumes” the largest bite out of in-state visitors’ expenditures (transportation follows closely).

Average Spending in Louisiana by Trip Type

Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.
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Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

Trip expenditures by segment

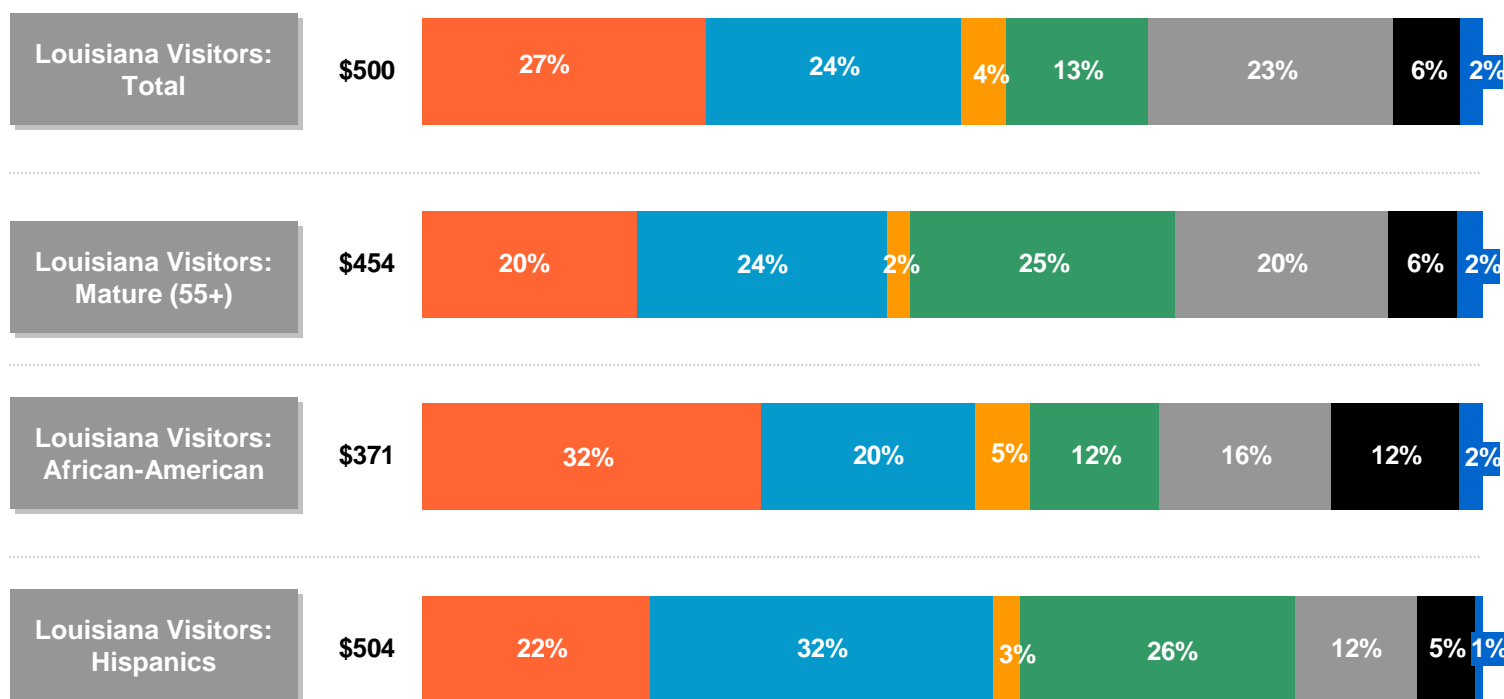
Visitor spending choices vary widely

- Mature visitors spend the largest share of their travel budgets on food and gaming
- African-Americans tend to spend less and Hispanics more – a pattern noted in both 2007 and 2008
- African-Americans spend slightly more on shopping and entertainment, which is consistent with a fondness for nightclubs and dancing, and less on accommodations, which is consistent with more day trips and more stays with friends/relatives.

Average Spending in Louisiana by Segment

Total Spending by Travel Party (Total Spending, including 0)

■ Transportation ■ Food ■ Entertainment ■ Casino/ Gaming ■ Lodging ■ Shopping ■ Other



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.

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* Caution: Small base size (n=17)

Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

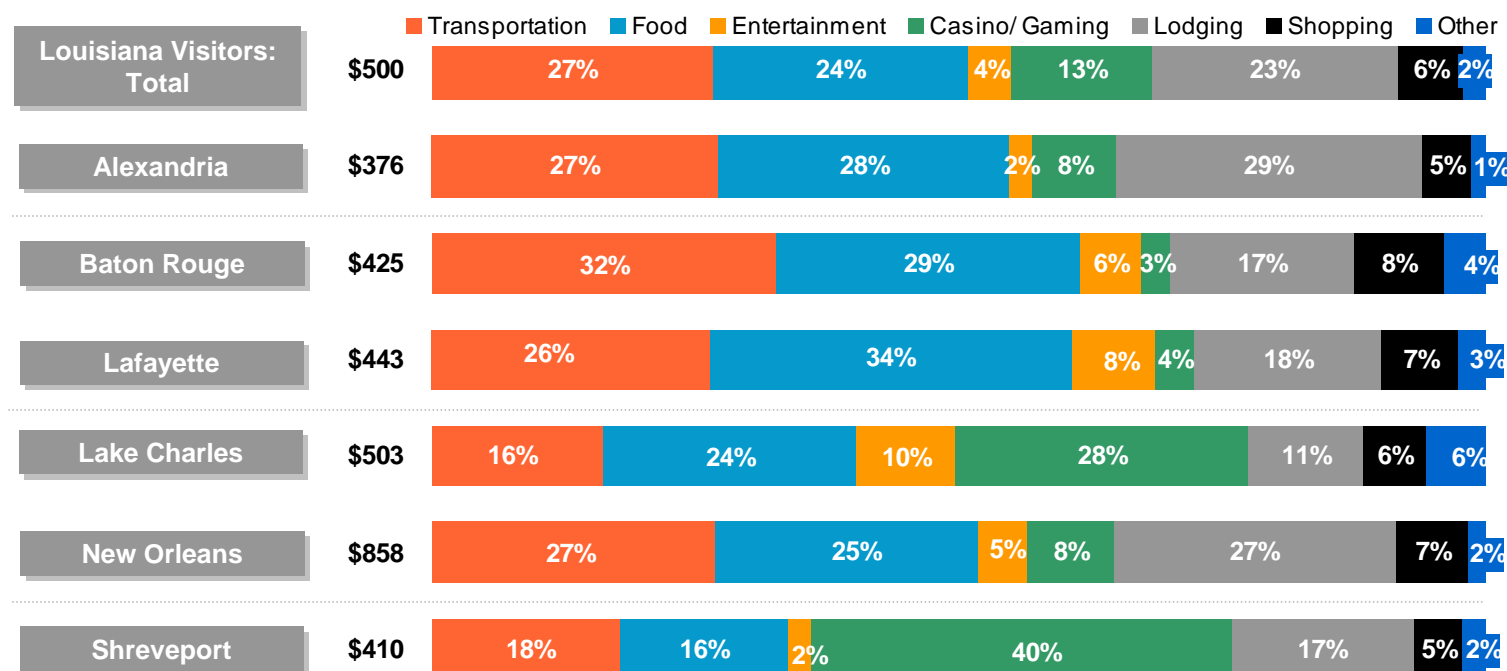
Trip expenditures by destination

New Orleans visitors spend more than others

- New Orleans visitors, who come from farther away and stay longer, also spend more
- Spending by visitors going to other areas hovers between \$400 and \$500 – slightly less for those visiting Alexandria.

Average Spending in Louisiana by Destination

Total Spending by Travel Party (Total Spending, including 0)



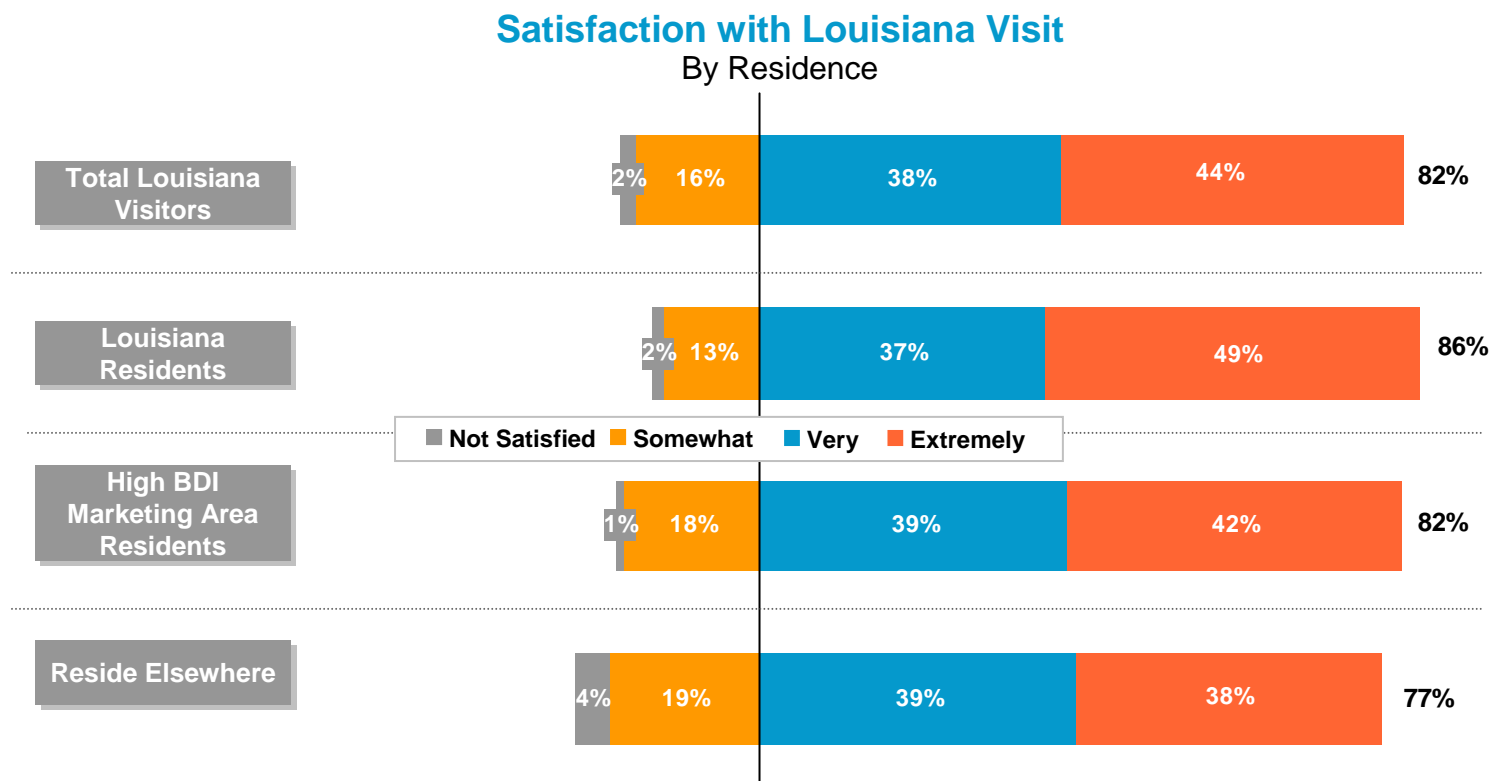
Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.
© TNS 2010

Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

Satisfaction with Louisiana by residence

Satisfaction is strong regardless of residence

- Top box (extremely satisfied) endorsements often correlate with proximity, and not surprisingly Louisiana residents provide the most favorable ratings of their home state
- About 8 in 10 visitors from both the High BDI marketing area and “elsewhere” also praise their trip
- Only 1% to 2% complain about Louisiana as a destination – slightly higher (4%) among those who live farthest away (“elsewhere”).



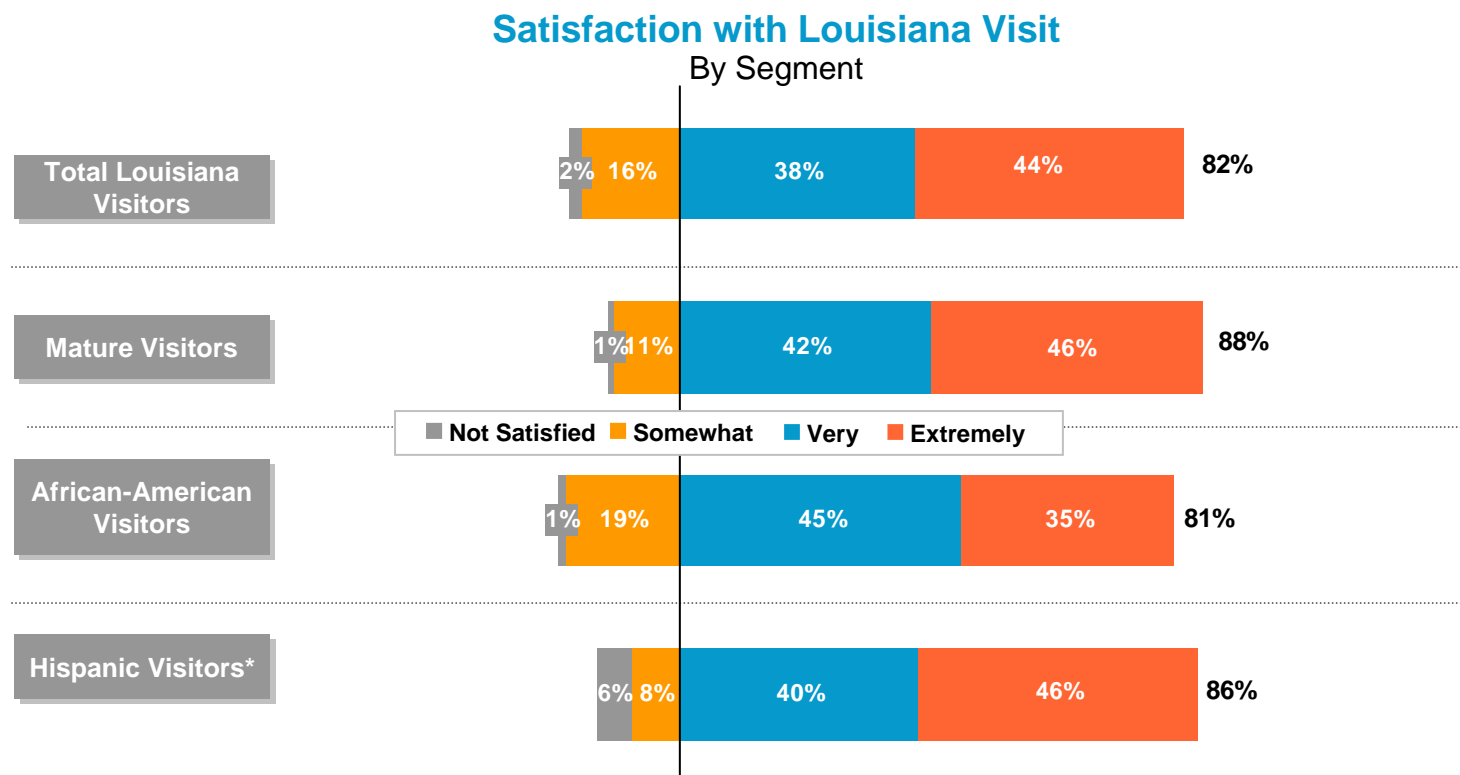
*Note: Not Satisfied includes *Not At All* and *Not Very Satisfied*
© TNS 2010

Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)

Satisfaction with Louisiana by segment

Satisfaction is also quite strong across key segments

- Satisfaction among Mature (86%) visitors matches total Louisiana visitors
- Hispanic visitors have relatively strong satisfaction, but also the largest (6%), but still small, group of unhappy visitors
- Very few (1%) Mature or African-American visitors indicate displeasure.



Note: Not Satisfied includes *Not At All* and *Not Very Satisfied*

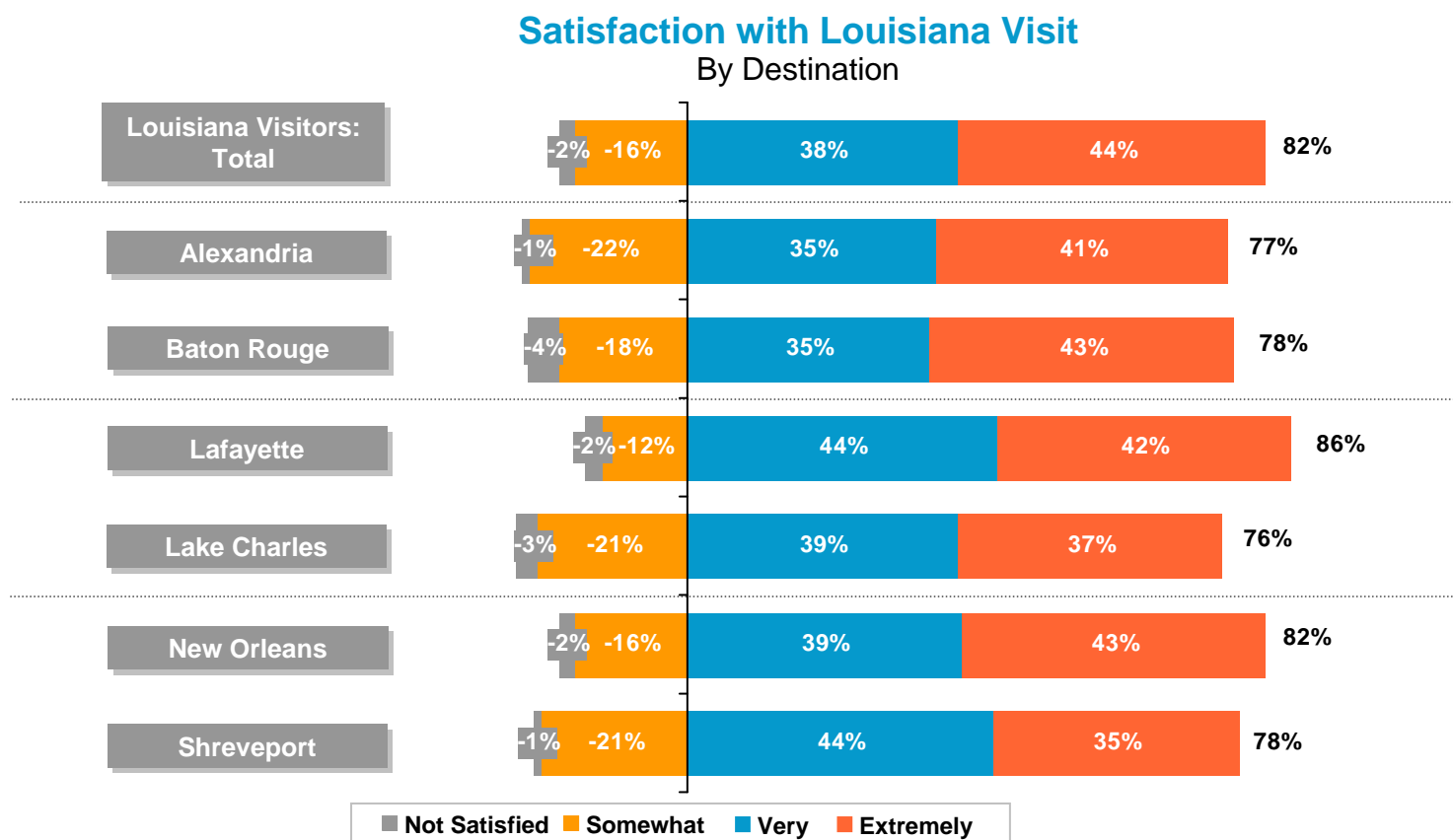
© TNS 2010 Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)

* Caution: Small base size (n=17)

Satisfaction with Louisiana by destination

Satisfaction varies somewhat by destination

- Lafayette and New Orleans visitors seem to go home slightly happier than visitors elsewhere in Louisiana
- Although only a few (3% - 4%) people, Lake Charles and Baton Rouge host the largest share of unsatisfied visitors.



Note: Not Satisfied includes *Not At All* and *Not Very Satisfied*

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Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)

Competitive States



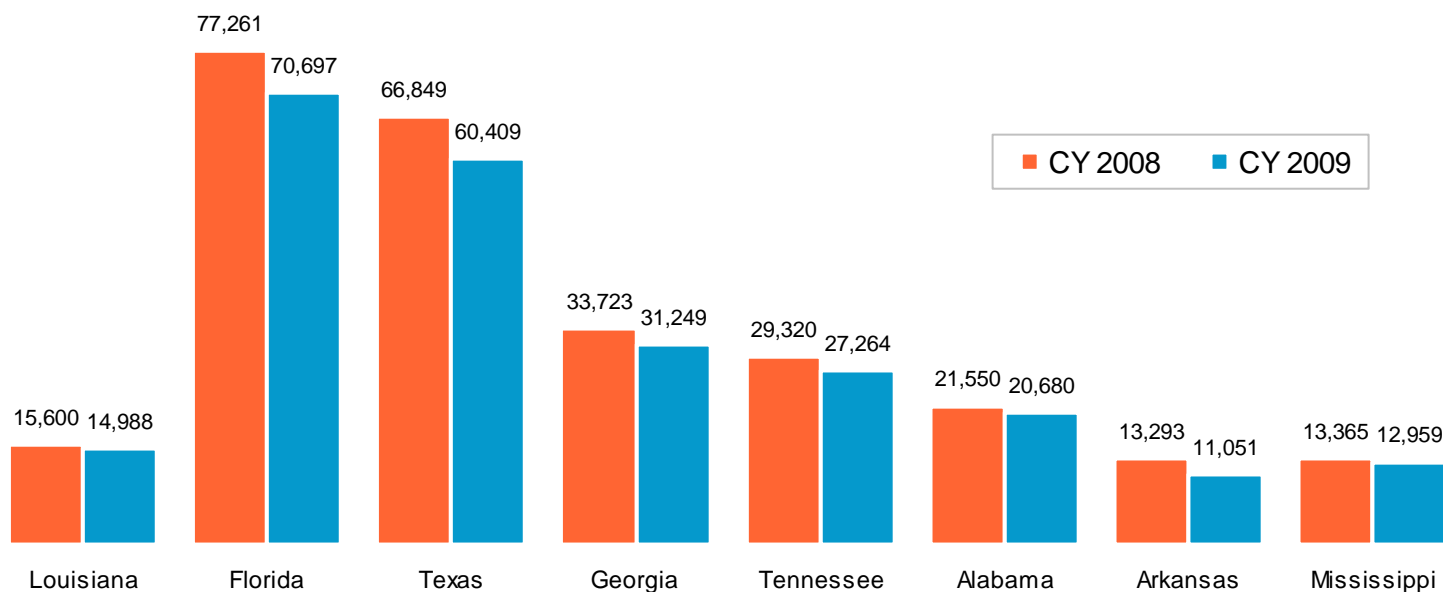
Competitive states' visitor volumes

Among eight key competitors, Louisiana ranks sixth

- Florida and Texas draw the largest share of visitors, although Texas is the most dependent of all states upon in-state visitation
- Louisiana draws a relatively high proportion of visitors from out-of-state – most similar to Alabama and Georgia.

Visitors (Person-Trips) to Louisiana and Competitive States

(Volume in 000)



% (Households) from Out-of-State

CY 2009	65%	59%	33%	64%	71%	67%	63%	74%
CY 2008	64%	59%	31%	65%	73%	67%	58%	71%



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Q4a. Please indicate the US state(s) visited (Person Trips-projected) (day or overnight trip)

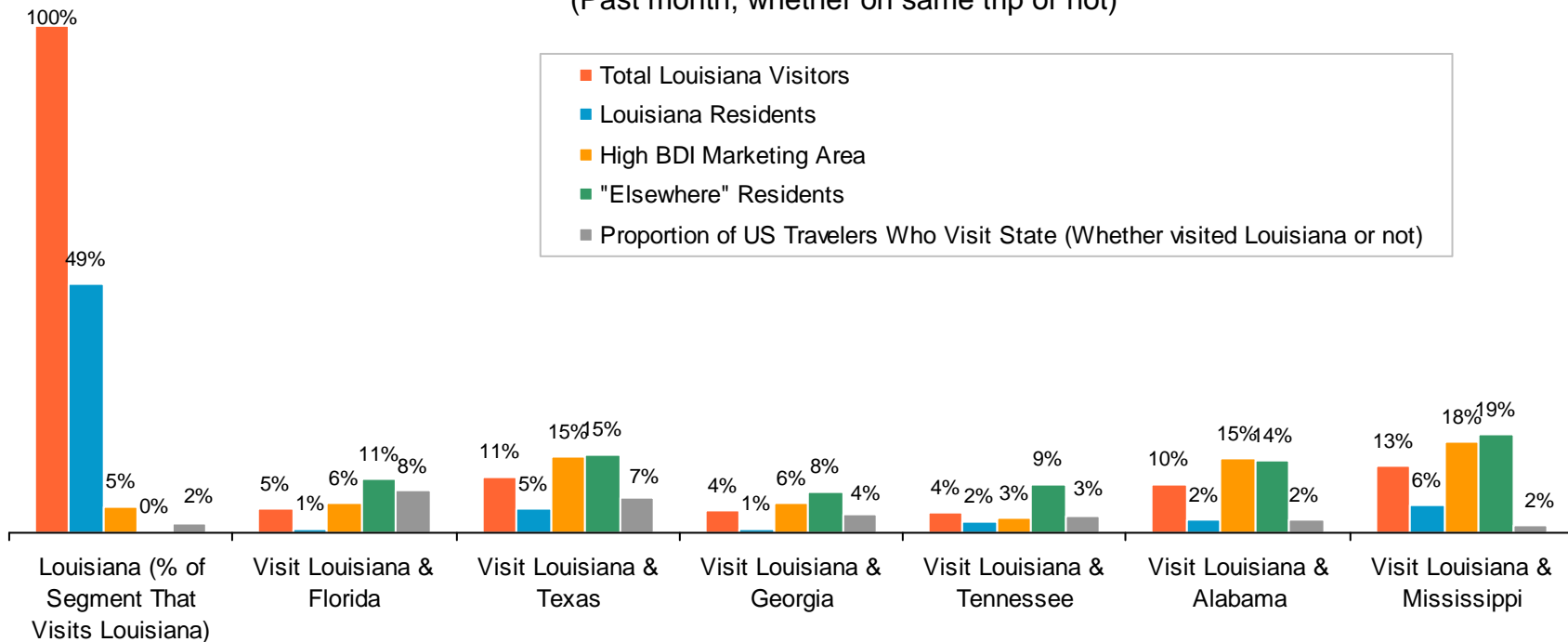
Key competitors to Louisiana (among Louisiana visitors)

Louisiana primarily shares visitors with TX, AL, and MS

- Among the total US market of all travelers, Florida (8%) and Texas (7%) draw the largest share of visitors among these key states. Louisiana, Alabama, and Mississippi attract the same proportion of all US visitors (2%).
- Texas, Alabama, and Mississippi most often entice Louisiana visitors to also stop in their state, whether they live in Louisiana, the High BDI Marketing Area, or Elsewhere; or conversely, Louisiana most successfully lures visitors to those states to add time in Louisiana as well.

Proportion of Louisiana Visitors Also Visiting Competitive States (5%+)

(Past month, whether on same trip or not)



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Q4a. Please indicate the US state(s) visited (Projected Person Trips)

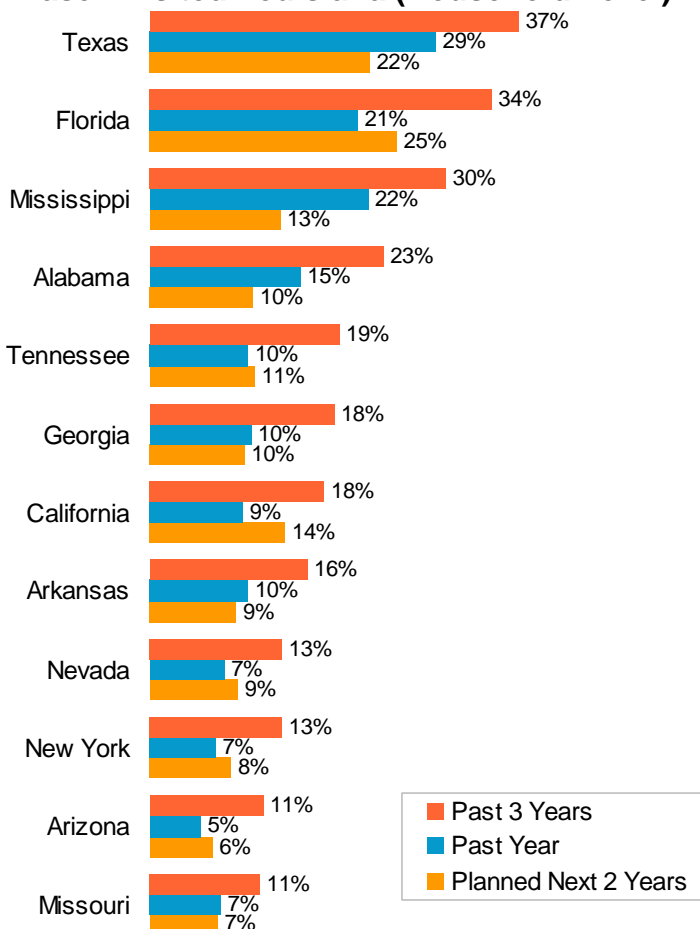
Competitive state and city destinations

Southern states and large cities compete with Louisiana

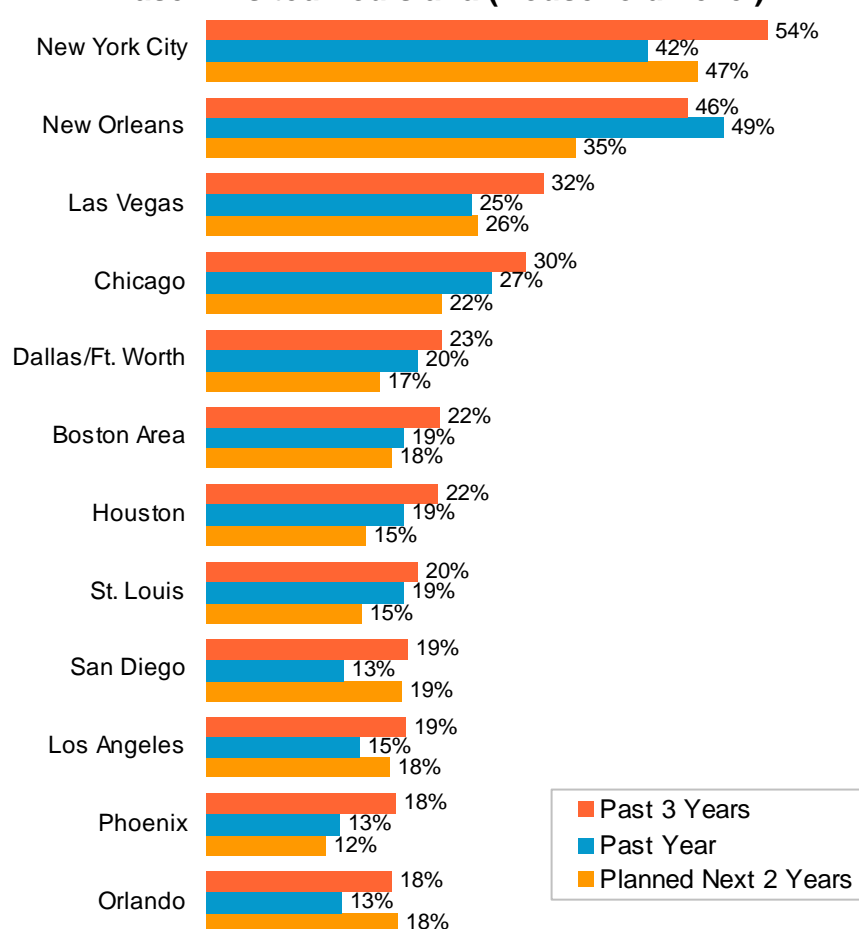
Other Areas Visited by Louisiana Visitors (Key Competitors)

% Visiting State/DMA Past Three Years (Ranking), Past Year, Planned Next Two Years

Top States Base: Visited Louisiana (Household Level)



Top Cities Base: Visited Louisiana (Household Level)



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Q7a: Please indicate US states visited for leisure in past three years. Q7b: Please indicate states visited within the past 12 months. Q7c: Which US states plan to visit within the next two years for leisure? Repeated for cities in Q8 series. (Household Level)

Another key competitor view (visited Louisiana or not)

Geography impacts destination choices

As noted in other TNS reports, geography plays a key role in destination selection – the states most likely visited/planned to visit vary by travelers' residence:

- **Louisiana residents** visit close to home, with Louisiana topping the list of eight competitive destinations for past visits (both the 3-year and 1-year time periods). They select *Texas* as the leading competitor. For future travel, *Florida* and *Texas* generate the greatest interest
- If travelers **live in the High BDI Marketing Area**, *Texas* tops the list for past visits (3 years or 1 year) while *Florida* (slightly) takes the lead for future plans. *Louisiana* ties for third in planned visits, but trails the others three for past visits
- Those living **elsewhere (neither the High BDI Marketing Area nor Louisiana)** seldom (4% in past 3 years) choose to visit *Louisiana*, usually opting for *Florida*.

Visitation (Households) by Residence Over Time

Competitive Set: AL, AR, FL, GA, LA, MS, TN, TX	Visited Past 3 Years	Visited Past Year	Plan to Visit Next 2 Years
RESIDE IN LOUISIANA			
Visit Louisiana	46%	42%	21%
Strongest Competitor (of the set)	44 (TX)	33 (TX)	34 (FL)
Second-Strongest Competitor	39 (MS)	31 (MS)	31 (TX)
Third-Strongest Competitor	36 (FL)	23 (FL)	20 (MS)
RESIDE IN HIGH BDI MKTG AREA			
Visit Louisiana	19%	13%	12%
Strongest Competitor	37 (TX)	33 (TX)	31 (FL)
Second-Strongest Competitor	33 (FL)	22 (FL)	22 (TX)
Third-Strongest Competitor	21 (GA)	15 (GA)	12 (TN)
RESIDE ELSEWHERE			
Visit Louisiana	4%	2%	3%
Strongest Competitor	29 (FL)	19 (FL)	26 (FL)
Second-Strongest Competitor	12 (GA)	7 (GA)	8 (TX)
Third-Strongest Competitor	11 (TN)	6 (TN/TX tie)	8 (GA)



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Q7a: Please indicate US states visited for leisure in past three years. Q7b: Please indicate states visited within the past 12 months.
Q7c: Which US states plan to visit within the next two years for leisure? (Household Level)

Competitive spending: Louisiana vs. nearby states

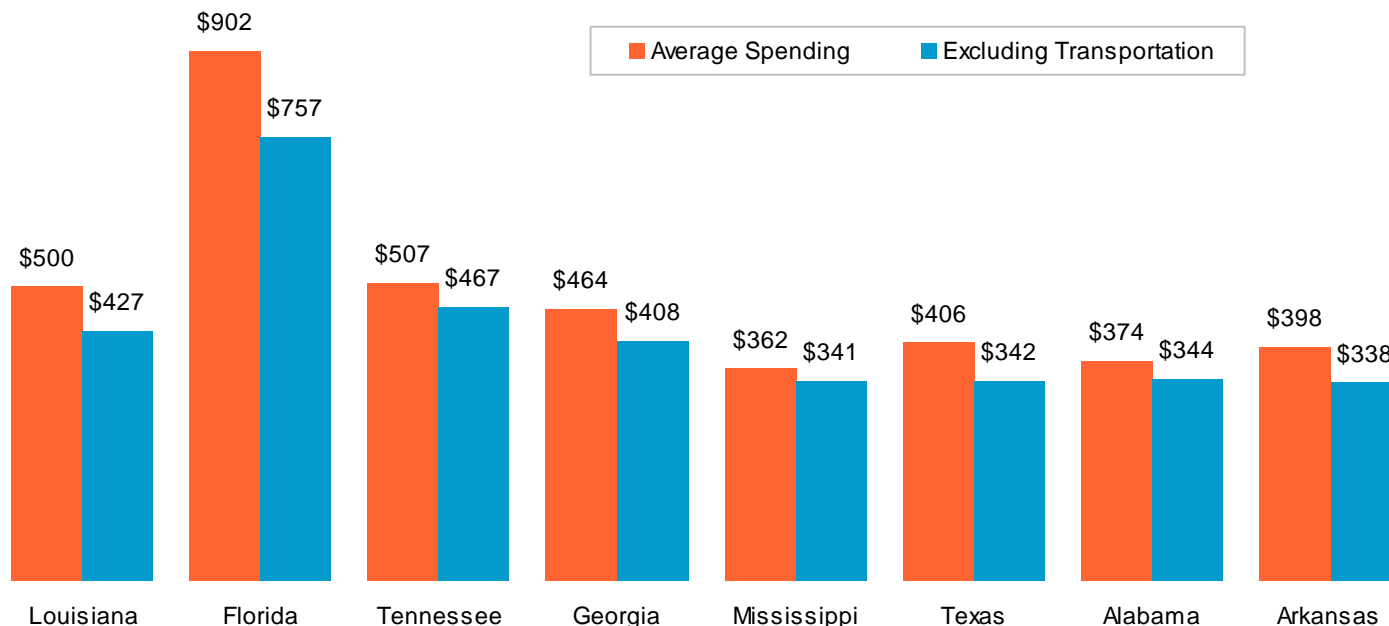
Trip spending usually hovers between \$400-\$500

Still, spending varies by destination:

- Florida continues to be the one exception, where (\$902) trip spending nearly doubles nearby states, but transportation accounts for a larger proportion than for other states
- Louisiana (\$500) and Tennessee vie for second (distantly); the economy has hit all destinations and Louisiana is no exception, with spending remaining near the two-year-ago level (\$518 for CY 2007).

Average Annual Spending (Q4g): Louisiana vs. Nearby States

Total Spending (Business/Leisure/Day/Overnight) by Travel Party (Total Spending, including 0)



© TNS 2010

Q4g. Please indicate the total dollar amount spent by your travel party (all) . . . (State Level – demo wtd)

Competitive states - trip purpose

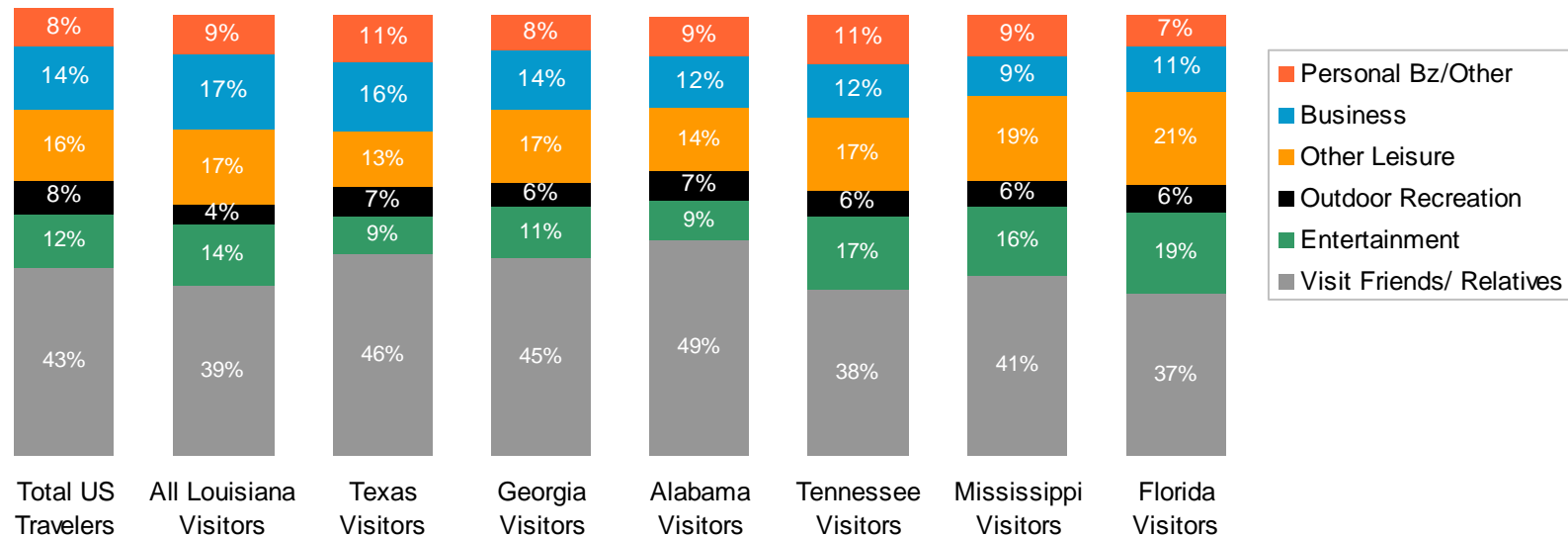
Reasons for travel vary minimally by state; leisure dominates

Further, visits to friends and relatives motivate most trips. Other observations include:

- Texas (16%) and Louisiana (17%) lead on business travel
- Entertainment attracts a larger proportion of visitors to Mississippi (gaming), Tennessee (Nashville and Dollywood), and Florida (Orlando) than other states with Louisiana placing about average.

Primary Purpose of Trip

Ranked by All Sources (5%+)



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Q1b. Which of the following was the primary purpose of your trip. . . (State Level – demo wtd)

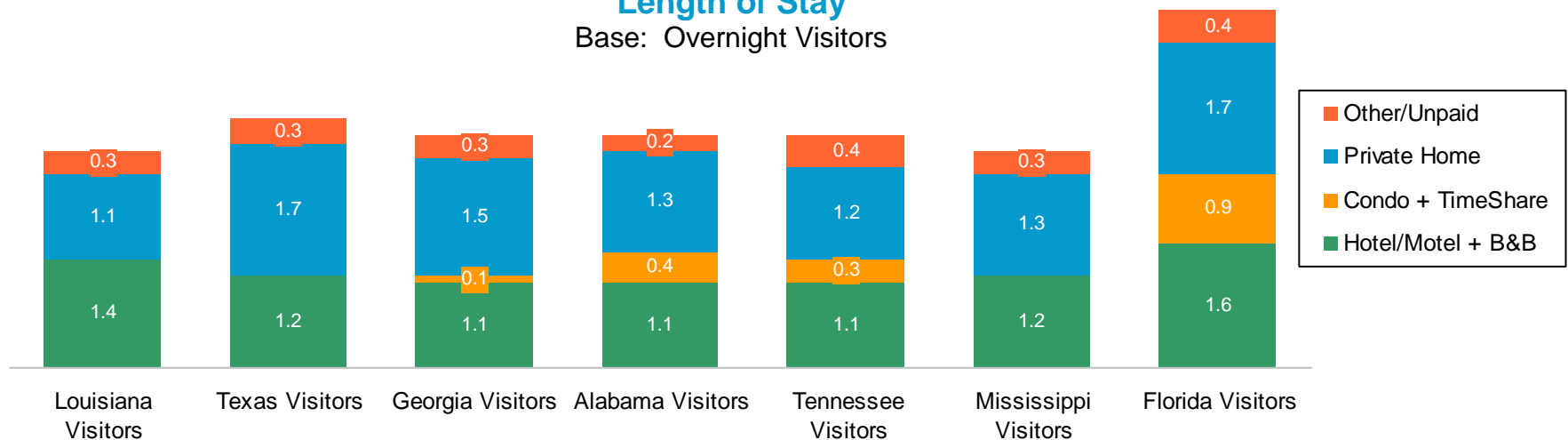
Competitive states: accommodations and length of stay

Somewhat more than a third stay in hotels/motels/B&Bs

Length of trip varies by destination:

- Florida visitors tend to stay the longest (4.7 nights) and thus lead on the number of nights in a hotel, motel or B&B (1.6), private homes (1.8), and is the only market with a notable presence in the condo/timeshare market (0.9)
- Louisiana places near average for total nights stayed but, more positively, hosts a higher percentage of those choosing paid hotel/motel/B&B accommodations.

Length of Stay
Base: Overnight Visitors



Average # of Nights:

Total	3.0	3.3	3.1	3.0	3.0	2.9	4.7
Paid*	1.4	1.2	1.1	1.1	1.1	1.2	1.6
% Paid/Total	47%	36%	35%	37%	37%	41%	34%

* Just Hotel/Motel/B&B



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Q4f. Abridged: Of the overnights in Louisiana, specify the number stayed at each accommodation (State Level)

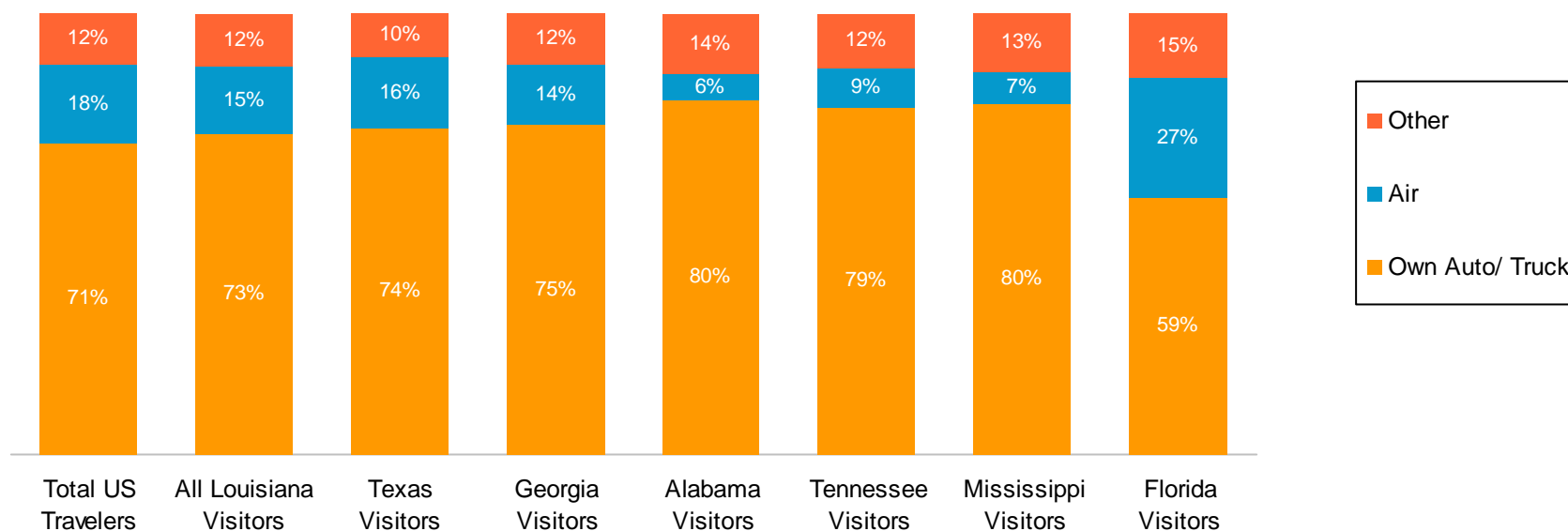
Competitive states: primary mode of transportation

Most travelers drive to their destination

Visitors to Louisiana (73%) and competitor states usually drive – similar to total US travelers (71%):

- However, Florida visitors far more often (27% vs. 18% nationally) choose to fly than those traveling elsewhere.
- Alabama (80%), Mississippi (80%), and Tennessee (79%) visitors rely slightly more heavily on their cars.

Primary Mode of Transportation of Louisiana Visitors



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Q2b. Abridged: Which was the primary mode of transportation used for your trip . . . (Household Level – demo wtd)

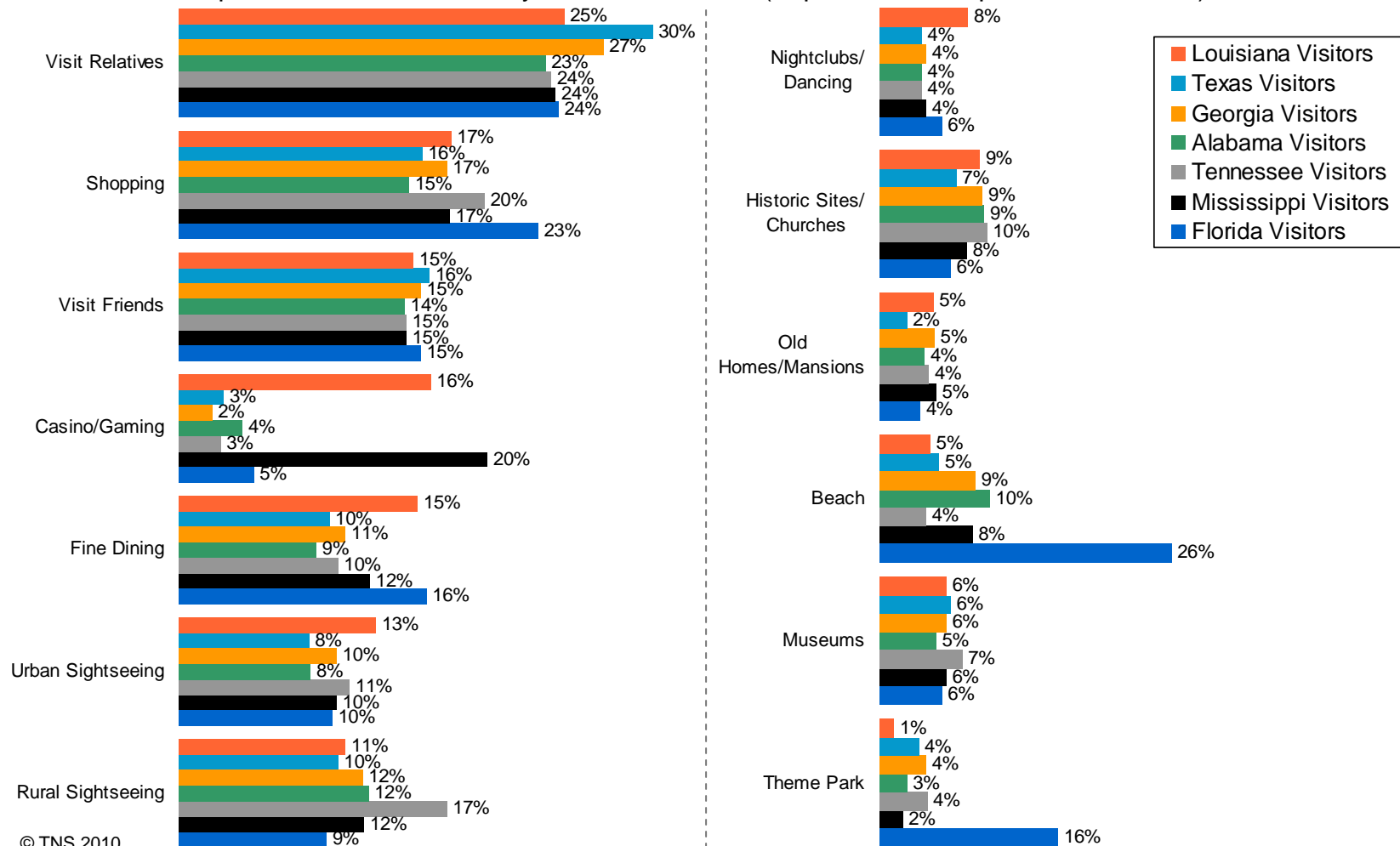
Competitive states: top 10 vacation activities

Top vacation activities/attractions vary substantially by state

Louisiana tops other destinations for *nightclubs/dancing*, *urban sightseeing*, and nearly ties Florida for *fine dining*. Other destination “ownership” includes: Florida for *theme parks* and *beaches*, Tennessee for *rural sightseeing*, and Mississippi for *gaming*.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Top 12 Activities plus Theme Parks)



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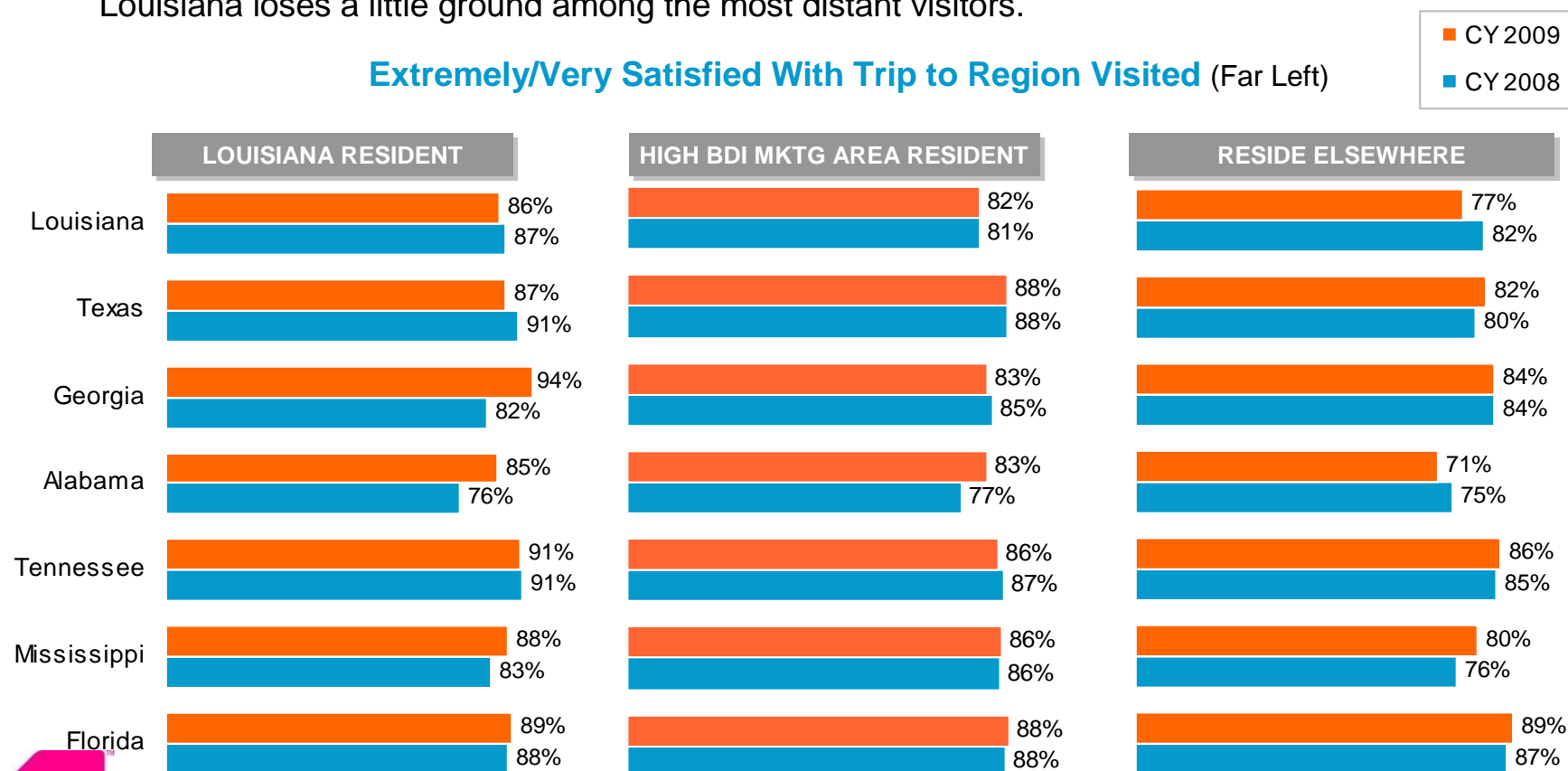
Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

Competitive states: satisfaction

Louisiana satisfies visitors, but lags several competitors

- **In-state residents** place Louisiana near the same level as competitors
- Although Louisiana places last **within the High BDI Marketing Area**, all competitors score similarly (between 82% and 88%)
- Among those **outside the state and the High BDI Marketing Area**, Louisiana tops only Alabama
- Georgia and Alabama gain somewhat among Louisiana residents; otherwise, all place near last year; Louisiana loses a little ground among the most distant visitors.

Extremely/Very Satisfied With Trip to Region Visited (Far Left)



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Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with (area indicated at far left). (State Level – demo wtd.)

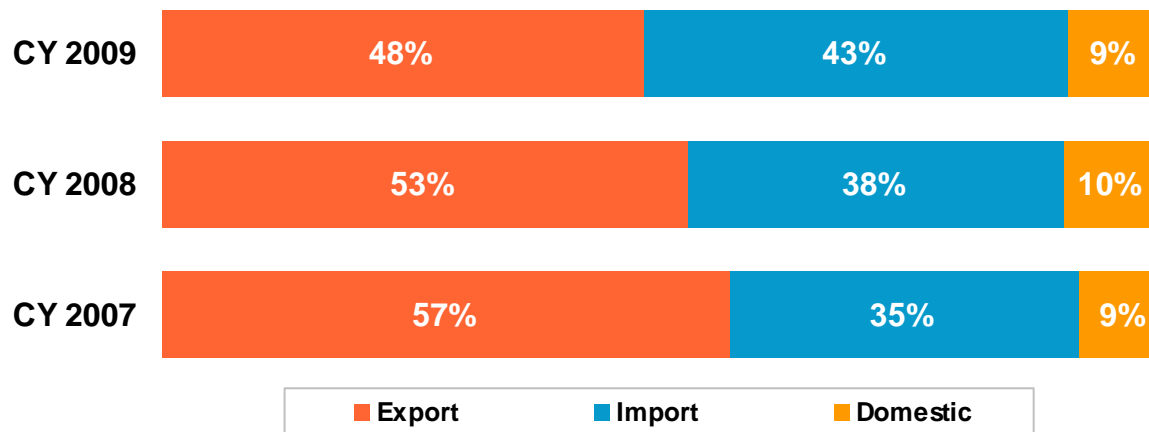
Export ~ Import



Export/Import

“Balance of Trade”

- Louisiana still shows a surplus “balance of trade” for tourism
- Although it continues to weaken, exports still exceed imports
- Roughly one in 10 (10%) tourism dollars remain in Louisiana as domestic Louisiana spending
- Spending that occurs outside the state by non-residents are not included in the chart.



Export represents \$ coming into Louisiana (Non-LA residents coming to LA)

Import represents \$ leaving Louisiana (LA residents traveling elsewhere)

Domestic represents \$ staying in Louisiana (LA residents spending within LA)



Segment/Destination Profiles

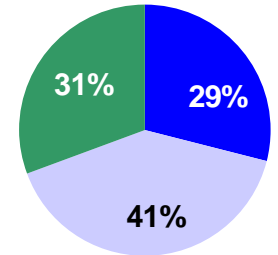
Mature visitor profile

Market relevance

The proportion of Louisiana's visitors that are 55 or older matches the US as a whole (31%). Comparisons below = (Mature vs. all Louisiana visitors)

By Age (Mature = 55+)

■ Under 35
■ 35 - 54
■ 55+



Demographic Profile:

- Age: By definition, this group is older (64 vs. 46)
- Income: Slightly higher incomes (\$68,800 vs. \$65,200)
- Married: Somewhat more than average (67% vs. 61%)
- Household composition: Usually live alone (24% vs. 23%) or with one other person (59% vs. 38%) and much less likely to live with children under 18 than average Louisiana visitors (10% vs. 32%)
- Ethnicity: Much more likely Caucasian (92% vs. 80%)
- Employment: Very likely to be retired (50% vs. 17%), as expected for this age group.

Trip Profile:

- Purpose: Almost as likely to *visit friends/relatives* (37% vs. 39%), and somewhat more likely to visit for *entertainment/sightseeing* (18% vs. 14%)
- Length of stay: Less likely to spend the night (64% vs. 69%) but stay the same length of time when they do (3.0 nights), and more often opt for paid (hotels/motels) lodging (53% vs. 47%)
- Travel party: Mostly travel in pairs (52% vs. 39%), usually with another household member (51% vs. 37%)
- Mode: Typically drive their own car (77% vs. 73%)
- Planning horizon: Less likely to make a last minute trip (40% vs. 45% decide within 2 weeks of trip)
- Activity choices: More often gamble (23% vs. 16%)
- Spending: Consistent with activity choices, spend more on gaming (\$113 vs. \$67), but spend slightly less overall (\$454 vs. \$500)
- Satisfaction with Louisiana: More satisfied than average (88% vs. 82%).

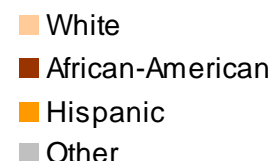


African-American visitor profile

Market relevance

About one in six (17%) Louisiana visitors claim African-American heritage, over twice that of US travelers overall (7%).
Comparisons below = (African-Americans vs. all Louisiana visitors)

Ethnicity



Demographic Profile:

- Age: Much younger than average (37 vs. 46) with half under 35 (51% vs. 29%)
- Income: Lowest of segments reviewed (\$50,700 vs. \$65,200); similar to in-state visitors (\$50,200)
- Married: Least likely married (37% vs. 61%), which contributes to lower incomes
- Household composition: More often live in larger (3+ members) households (44% vs. 39%) and live with children (40% vs. 32%)
- Employment: Most likely to be employed full-time, reflecting their younger ages (68% vs. 63%).

Trip Profile:

- Purpose: Most likely of segments to *visit friends/relatives* (46% vs. 39%)
- Length of stay: Nearly as likely to spend the night (64% vs. 69%) as average travelers and stay just as long (3.0 nights), but spend more nights in the homes of friends/relatives (43% vs. 37%)
- Travel party: More likely to travel in a larger (3+) group (38% vs. 33%) and with children (33% vs. 24%)
- Mode: Usually drive their own car (63% vs. 73%), but three times as likely to rent a car (12% vs. 4%)
- Planning horizon: Similar spontaneity as average travelers (46% vs. 45% decide to visit Louisiana within two weeks of their trip)
- Activity choices: African-Americans more often (19% vs. 15%) visit friends (consistent with lodging) and they opt for nightclubs/dancing (16% vs. 8%) twice as often (consistent with age)
- Spending: Spend the least (\$371 vs. \$500) of any segment except in-state visitors (\$209)
- Satisfaction with Louisiana: Relatively satisfied with Louisiana, similar to all visitors (81% vs. 82%).



Hispanic visitor profile

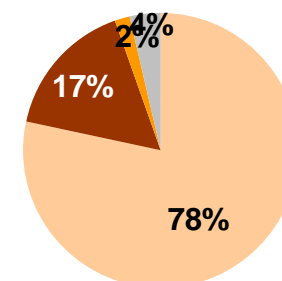
Market relevance

Caution: Very Small Sample (17) yields less reliable comparisons

The smallest segment reviewed, only one in 50 Louisiana visitors (2%) claim Hispanic heritage, half the level of US travelers overall (4%). Comparisons below = (Hispanics vs. all Louisiana visitors)

Ethnicity

- White
- African-American
- Hispanic
- Other



Demographic Profile:

- Age: Hispanics match the average age of all Louisiana visitors (46)
- Income: Slightly below average (\$63,800 vs. \$65,200)
- Married: Less likely married (47% vs. 61%)
- Household composition: Live in larger (3+) households (59% vs. 39%) with children (41% vs. 32%).

Trip Profile:

- Purpose: Usually pleasure (78% vs. 74%), but not so much to see friends/relatives (30% vs. 39%)
- Length of stay: Almost always stay overnight (94% vs. 69%) and usually in a hotel/motel (71% vs. 47%), but not as long as others (2.4 vs. 3.0 nights)
- Travel party: Often travel solo (41% vs. 28%) or in larger (3+) groups (42% vs. 33%), but less likely to travel with children (16% vs. 24%)
- Mode: More likely to fly to Louisiana than average (36% vs. 15%)
- Planning horizon: Not very spontaneous (32% vs. 45% decide to visit LA within two weeks of the trip)
- Activity choices: More often choose casinos/gaming (31% vs. 16%), fine dining (24% vs. 15%), and nightclubs/dancing (22% vs. 8%)
- Spending: Spend about average (\$504 vs. \$500)
- Satisfaction with Louisiana: Above average satisfaction (86% vs. 82%) extremely or very satisfied.



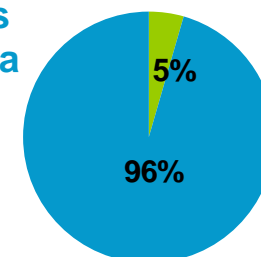
Alexandria visitor profile

Market relevance

About one in 20 (5%) Louisiana visitors stops in Alexandria.
Comparisons below = (Alexandria vs. all Louisiana visitors)

% of Louisiana Visitors
Who Went to Alexandria

Alexandria
Non-Alexandria



Demographic Profile:

- Age: Somewhat younger (43 vs. 46)
- Income: Less affluent (\$46,700 vs. \$65,200)
- Married: Less often married (53% vs. 61%)
- Household composition: Seldom live alone (18% vs. 23%); matches other LA visitors on living with one other person (39% vs. 38%); somewhat more likely to live in a larger-member (3+) household (43% vs. 39%) and more often live with children under 18 (41% vs. 32%)
- Ethnicity: Less likely Caucasian (70% vs. 80%); more often African-American (22% vs. 17%)
- Employment: About average for full-time employment (60% vs. 63%)
- Residence: Most visitors live in-state (58% vs. 37%).

Trip Profile:

- Purpose: More likely to *visit friends/relatives* (46% vs. 39%)
- Length of stay: More likely to spend the night (78% vs. 69%), stay longer (3.4 vs. 3.0 nights), and choose hotels/motels for lodging almost as often (44% vs. 47%)
- Travel party: Less likely to travel in pairs (21% vs. 39%), more often in a group of 3+ (55% vs. 33%)
- Mode: Typically drive their own car more often than the average LA visitor (79% vs. 73%)
- Planning horizon: Very spontaneous (61% vs. 45% decide to visit within 2 weeks of trip)
- Activity choices: Far more often come to visit relatives (38% vs. 25%) than any other activity
- Spending: Consistent with activity and purpose (visiting), Alexandria visitors spend the least of the six destinations (\$376 vs. \$500)
- Satisfaction with Louisiana: Although highly satisfied, these visitors lag other destinations (77% vs. 82%).



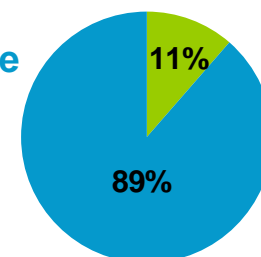
Baton Rouge visitor profile

Market relevance

About one in nine (11%) Louisiana visitors stops in Baton Rouge.
Comparisons below = (Baton Rouge vs. all Louisiana visitors)

% of Louisiana Visitors
Who Went to Baton Rouge

■ Baton Rouge
■ Non-Baton Rouge



Demographic Profile:

- Age: Somewhat younger (44 vs. 46)
- Income: Less affluent (\$59,300 vs. \$65,200)
- Married: Equally likely to be married (62% vs. 61%)
- Household composition: Less likely to live alone (19% vs. 23%) or with one other person (24% vs. 38%); much more likely to live in a larger (3+) household (57% vs. 39%) and with children < 18 (45% vs. 32%)
- Ethnicity: Average likelihood to be Caucasian (77% vs. 80%) or African-American (19% vs. 17%)
- Employment: Near average for full-time employment (64% vs. 63%)
- Residence: Half of visitors live in-state (49% vs. 37%).

Trip Profile:

- Purpose: More likely to *visit friends/relatives* (50% vs. 39%)
- Length of stay: Average likelihood to spend the night (72% vs. 69%), but stay longer (3.4 vs. 3.0 nights) when they do; lodge more often with friends/relatives (47% vs. 37%) than hotels/motels (38% vs. 47%)
- Travel party: More travel solo (34% vs. 28%) or in a 3+ group (38% vs. 33%) than in pairs (28% vs. 39%)
- Mode: Typically drive their own car, similar to the average LA visitor (76% vs. 73%)
- Planning horizon: Average spontaneity (48% vs. 45% decide to visit within 2 weeks of trip)
- Activity choices: More visit relatives (28% vs. 25%) or friends (22% vs. 15%) than any other activity
- Spending: Baton Rouge visitors spend near the middle of these six destinations (\$425 vs. \$500)
- Satisfaction with Louisiana: Although highly satisfied, these visitors lag other destinations (78% vs. 82%).



Lafayette visitor profile

Market relevance

About one in 14 (7%) Louisiana visitors stops in Lafayette.
Comparisons below = (Lafayette vs. all Louisiana visitors)

Demographic Profile:

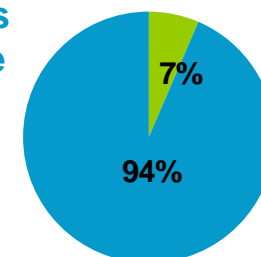
- Age: Much younger (41 vs. 46)
- Income: Less affluent (\$49,800 vs. \$65,200)
- Married: Less often married (51% vs. 61%)
- Household composition: More often live alone (38% vs. 23%) rather than with one other person (20% vs. 38%), but many live in larger (3+) households (42% vs. 39%) and with children under 18 (33% vs. 32%)
- Ethnicity: Less likely Caucasian (74% vs. 80%); more often African-American (24% vs. 17%)
- Employment: Somewhat more likely to be employed full-time (69% vs. 63%)
- Residence: Half of visitors live in-state (49% vs. 37%).

Trip Profile:

- Purpose: Often *visit friends/relatives* (42% vs. 39%), but above average for *business* (29% vs. 17%)
- Length of stay: Typically spend the night (71% vs. 69%), but stay longer (3.8 vs. 3.0 nights) than average; less likely to lodge in hotels/motels (29% vs. 47%) than private homes (37% vs. 37%); highest condo usage (8% vs. 0%)
- Travel party: Tend to travel solo (40% vs. 28%) rather than in pairs (28% vs. 39%)
- Mode: More drive their own car than average (85% vs. 73%)
- Planning horizon: Very spontaneous (59% vs. 45% decide to visit within 2 weeks of trip)
- Activity choices: The leading activity is to visit relatives (23% vs. 25%)
- Spending: Lafayette visitors spend the third most of these six destinations (\$443 vs. \$500), aided by the larger share of business visitors
- Satisfaction with Louisiana: Most satisfied of the six destinations (86% vs. 82%).

% of Louisiana Visitors
Who Went to Lafayette

■ Lafayette
■ Non-Lafayette



Lake Charles visitor profile

Market relevance

About one in 20 (5%) Louisiana visitors stops in Lake Charles.
Comparisons below = (Lake Charles vs. all Louisiana visitors)

Demographic Profile:

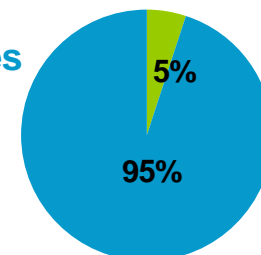
- Age: Near the average Louisiana visitor (47 vs. 46)
- Income: Also near average (\$64,100 vs. \$65,200)
- Married: Nearly matches the average Louisiana visitor (62% vs. 61%)
- Household composition: Some live alone (26% vs. 23%) or with one other person (32% vs. 38%); many live in a larger-member (3+) household (42% vs. 39%) and with children under 18 (46% vs. 32%)
- Ethnicity: Typically Caucasian (81% vs. 80%); fewer African-Americans (12% vs. 17%) than average
- Employment: Somewhat fewer full-time employees (58% vs. 63%); more retirees (31% vs. 17%)
- Residence: A fifth of visitors live in-state (22% vs. 37%).

Trip Profile:

- Purpose: A third *visit friends/relatives* (32% vs. 39%), but an above average proportion comes for *entertainment/sightseeing* (24% vs. 14%)
- Length of stay: Most spend the night (72% vs. 69%), but for shorter stays than average (2.7 vs. 3.0 nights); more visitors stay in hotels/motels than elsewhere, but less than average (41% vs. 47%)
- Travel party: Most often travel in pairs (39% vs. 39%); nearly equal split between solo (31% vs. 28%) and 3+ groups (30% vs. 33%)
- Mode: Typically drive their own car (86% vs. 73%)
- Planning horizon: Very spontaneous (56% vs. 45% decide to visit within 2 weeks of trip)
- Activity choices: Dominated by casino/gaming (51% vs. 16%)
- Spending: These visitors spend the second-most after New Orleans (\$503 vs. \$500); 28% on gaming
- Satisfaction with Louisiana: Although usually satisfied, these visitors place below average (76% vs. 82%).

% of Louisiana Visitors
Who Went to Lake Charles

■ Lake Charles
■ Non-Lake Charles



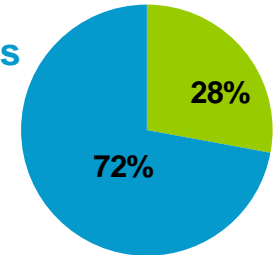
New Orleans visitor profile

Market relevance

Over a quarter (28%) of Louisiana visitors stops in New Orleans.
Comparisons below = (New Orleans vs. all Louisiana visitors)

% of Louisiana Visitors
Who Went to New Orleans

■ New Orleans
■ Non-New Orleans



Demographic Profile:

- Age: Somewhat younger (42 vs. 46)
- Income: The only city exceeding the average (\$78,300 vs. \$65,200)
- Married: Slightly less often married (57% vs. 61%)
- Household composition: Average levels overall – living alone (23% vs. 23%), with one other person (38% vs. 38%), larger-member (3+) households (39% vs. 39%), living with children under 18 (35% vs. 32%)
- Ethnicity: About average for Caucasians (76% vs. 80%) and African-Americans (19% vs. 17%)
- Employment: Above average full-time employment (74% vs. 63%)
- Residence: A quarter of visitors live in-state (26% vs. 37%).

Trip Profile:

- Purpose: Often *visit friends/relatives* (32% vs. 39%); above average *business* travel (27% vs. 17%)
- Length of stay: More likely to spend the night (81% vs. 69%), stay longer (3.6 vs. 3.0 nights), and usually choose hotels/motels for lodging (56% vs. 47%)
- Travel party: Often travel in pairs (37% vs. 39%); more visit alone (34% vs. 28%), consistent with more business travelers; fewer come in 3+ groups (29% vs. 33%)
- Mode: Drive their own car less often than average (51% vs. 73%); more often fly (39% vs. 15%)
- Planning horizon: Less spontaneous (31% vs. 45% decide to visit within 2 weeks of trip)
- Activity choices: New Orleans leads on urban activities: fine dining (29% vs. 15%), urban sightseeing (27% vs. 13%), shopping (25% vs. 17%), historic sites/churches (19% vs. 9%), nightclubs/dancing (18% vs. 8%), museums (12% vs. 6%)
- Spending: New Orleans visitors spend more than any of the other six destinations (\$858 vs. \$500)
- Satisfaction with Louisiana: Highly satisfied, placing at the Louisiana average (82% vs. 82%).



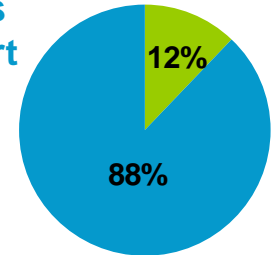
Shreveport visitor profile

Market relevance

About one in eight (12%) Louisiana visitors stops in Shreveport.
Comparisons below = (Shreveport vs. all Louisiana visitors)

% of Louisiana Visitors
Who Went to Shreveport

■ Shreveport
■ Non-Shreveport



Demographic Profile:

- Age: Older than other visitors (50 vs. 46)
- Income: Less affluent (\$56,000 vs. \$65,200)
- Married: Matches the average Louisiana visitor (62% vs. 61%)
- Household composition: Near average in living alone (21% vs. 23%), with one other person (36% vs. 38%), in a larger-member (3+) households (43% vs. 39%), and with children (35% vs. 32%)
- Ethnicity: Similar Caucasian (79% vs. 80%) and African-American (20% vs. 17%) heritage as others
- Employment: Much less likely employed full-time (47% vs. 63%); more often retired (31% vs. 17%)
- Residence: A third of visitors live in-state (34% vs. 37%), similar to all Louisiana visitors.

Trip Profile:

- Purpose: Fewer *visit friends/relatives* (29% vs. 39%); more for *entertainment/sightseeing* (22% vs. 14%)
- Length of stay: Often spend the night (67% vs. 69%), but stay for shorter trips (2.6 vs. 3.0 nights) and more often opt for hotels/motels for lodging (65% vs. 47%)
- Travel Party: More visitors travel in pairs (46% vs. 39%), fewer alone (21% vs. 28%)
- Mode: Typically drive their own car and more often than the average LA visitor (85% vs. 73%)
- Planning horizon: Very spontaneous (53% vs. 45% decide within 2 weeks of trip)
- Activity choices: Far more often come for casinos/gaming (38% vs. 16%) than any other activity, although Shreveport trails Lake Charles (51%)
- Spending: Shreveport visitors spend the second-lowest of the six destinations (\$410 vs. \$500, only Alexandria visitors spend less), 40% of the travel budget goes for gaming
- Satisfaction with Louisiana: Although highly satisfied, these visitors lag other destinations (78% vs. 82%).



Appendix



Louisiana's Business Development Index – Top 50

BDI Calculations

- The Business Development Index, calculated for each DMA, measures the propensity of residents to take trips to Louisiana compared to that DMA's proportion of the total population. For example, Greenwood-Greenville, MS residents represent 0.066% of all US residents, but 0.673% of total Louisiana visitors.
- Those proportions $0.673/0.066 \times 100$ yield a BDI of 1015. The baseline (100) represents an equal proportion of US households as Louisiana visitors from that DMA.

Louisiana High BDI Index: Results by DMA

DMA of Origin	Total US Population	% of Population	Louisiana Visitors (Person-Trips)	% Visitors	High BDI Index
Greenwood-Greenville, MS	201,964	0.066%	101	0.673%	1015
Beaumont-Port Arthur, TX	445,507	0.146%	213	1.420%	971
Biloxi-Gulfport, MS	328,684	0.108%	152	1.013%	939
Tyler-Longview, TX	716,052	0.235%	308	2.053%	873
Jackson, MS	913,107	0.300%	369	2.459%	820
Houston, TX	6,137,755	2.015%	1,426	9.504%	472
Montgomery-Selma, AL	632,250	0.208%	115	0.766%	369
Mobile-Pensacola, AL-FL	1,387,892	0.456%	219	1.460%	320
Columbus-Tupelo-West Point, MS	487,268	0.160%	67	0.447%	279
Abilene-Sweetwater, TX	305,879	0.100%	42	0.280%	279
Dallas-Ft. Worth, TX	6,998,803	2.297%	879	5.858%	255
Corpus Christi, TX	566,209	0.186%	69	0.460%	247
Little Rock-Pine Bluff, AR	1,426,588	0.468%	160	1.066%	228
San Antonio, TX	2,359,413	0.775%	263	1.753%	226
Waco-Temple-Bryan, TX	925,408	0.304%	103	0.686%	226



Louisiana's Business Development Index – Top 50 *(con't)*

Louisiana High BDI Index *continued*

DMA of Origin	Total US Population	% of Population	Louisiana Visitors (Person-Trips)	% Visitors	High BDI Index
Paducah-Cape Girardeau-Harrisburg	967,015	0.317%	99	0.660%	208
Odessa-Midland, TX	392,964	0.129%	34	0.227%	176
Atlanta, GA	6,571,225	2.157%	514	3.426%	159
Austin, TX	1,801,247	0.591%	137	0.913%	154
Hattiesburg-Laurel, MS	293,143	0.096%	22	0.147%	152
Rapid City, SD	246,863	0.081%	18	0.120%	148
San Angelo, TX	141,643	0.046%	9	0.060%	129
Helena, MT	65,789	0.022%	4	0.027%	123
Omaha, NE	1,055,116	0.346%	63	0.420%	121
Gainesville, FL	322,150	0.106%	19	0.127%	120
Huntsville-Decatur (Florence), AL	965,534	0.317%	55	0.367%	116
Savannah, GA	856,776	0.281%	48	0.320%	114
Panama City, FL	368,863	0.121%	20	0.133%	110
Butte-Bozeman, MT	167,936	0.055%	9	0.060%	109
Memphis, TN	1,791,884	0.588%	88	0.587%	100
Dothan, AL	249,298	0.082%	12	0.080%	98
Burlington-Plattsburgh, VT-NY	842,980	0.277%	39	0.260%	94
Missoula, MT	285,401	0.094%	13	0.087%	92



Louisiana's Business Development Index – Top 50 *(con't)*

Louisiana High BDI Index *continued*

DMA of Origin	Total US Population	% of Population	Louisiana Visitors (Person-Trips)	% Visitors	High BDI Index
Oklahoma City, OK	1,751,302	0.575%	75	0.500%	87
Orlando-Daytona Beach-Melbourne, FL	3,723,526	1.222%	157	1.046%	86
Nashville, TN	2,597,791	0.853%	100	0.666%	78
Rockford, IL	497,265	0.163%	19	0.127%	78
Idaho Falls-Pocatello, ID	359,324	0.118%	13	0.087%	73
Tallahassee-Thomasville, FL-GA	725,699	0.238%	25	0.167%	70
Lincoln & Hastings-Kearny, NE	706,841	0.232%	24	0.160%	69
Jacksonville, FL	1,758,602	0.577%	59	0.393%	68
Kansas City, MO-KS	2,396,348	0.787%	80	0.533%	68
Minot-Bismarck-Dickinson, ND	337,691	0.111%	11	0.073%	66
Grand Junction-Montrose, CO	185,387	0.061%	6	0.040%	66
Richmond-Petersburg, VA	1,422,706	0.467%	42	0.280%	60
Pittsburgh, PA	2,807,001	0.921%	82	0.547%	59
Wichita-Hutchinson Plus, KS	1,171,030	0.384%	33	0.220%	57
San Diego, CA	3,064,619	1.006%	83	0.553%	55
Wichita Falls & Lawton, TX-OK	414,253	0.136%	11	0.073%	54
Greenville-Spartanburg-Asheville	2,131,902	0.700%	56	0.373%	53



Glossary

Term	Definition
Balance of Trade	Net Export-Import (Surplus = +; Deficit = -)
Import	Money departing the state (Louisiana residents vacationing elsewhere)
Export	Money entering the state (Non-Louisiana residents visiting Louisiana)
DMA	Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US)
Calendar Year	January 1, 2009 through December 31, 2009
In-State	Louisiana
Person-Trip	Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips)
High BDI Marketing Area	DMAs where residents have an above average propensity to visit Louisiana
Respondent/Household Level	Respondent information – one count per respondent
Source of Visitors	Residence of visitors
State/Region Level	Information about all trips taken to a particular state/region (each trip to area counts)
Travel Party	Traveler plus all companions, including children
Trip	Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator). This may eliminate some leisure day trips that are closer than 50 miles away.
Trip Level	Information about all trips – each trip counts
Trip Volume	All trips summed together
FutureView™	TNS' FutureView™ identifies five consumer categories. Of those, "Future Shapers" quickly adopt new products and influence others. They share seven traits: value authenticity/originality, well informed/involved, individualistic, time-poor, socially responsible, curious/open-minded/receptive to new ideas, and advocates of new ideas – they spread the word.
Visitor	Person who has visited Louisiana in the past month; all are US residents, thus, travel is domestic travel only (domestic consumer)



Research Methods

The syndicated TravelsAmerica study uses a web-based research methodology. Sample is selected from the TNS 6th dimension USA Panel with monthly e-mail invitations sent to representative households with a target response rate of 45%. The field period runs for two weeks each month, usually starting in the middle of the first week. TNS constantly strives to keep Internet penetration high and panel fatigue low by carefully monitoring and limiting the number of contacts with each household.

To enhance relevance, the data are weighted two ways:

- Demographic weights adjust respondents by demographic factors such as region, age, income, household size, and marital status to more closely represent the characteristics of the US population
- Trip projection calculations count every trip taken by respondents for total trips taken and in the case of state level calculations, each trip taken in that state counts. A few tables represent person-trips – these take into account the immediate household travel party size for each trip as well..

TNS supervises all fieldwork, editing, coding, and tabulation of the results.

This special report focuses on results for Louisiana. For the calendar year ending December 31, 2009, respondents for key segments in this report are shown below.

CY 2009 Number of Travelers (Unweighted Respondents)	CY 2009 Number of Travelers (Weighted by Demographics)	Region
1,439	1,534	Louisiana Residents
15,241	15,539	High BDI Marketing Area
109,434	108,391	Reside Elsewhere (not Louisiana, not High BDI Mktg Area)
126,114	125,464	Total for TravelsAmerica





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